Montana Prevention

WITS User Guide

June 2016

WITS Team

FEi Systems

Contents

Overview and Introduction

Montana WITS is an internet based data collection and reporting system sponsored by the State of Montana.

- Allows the State and their Prevention Contractor (Boyd Andrews Management Services – BAMS) to establish an electronic mechanism for their Prevention Providers to use to record information related to the State's Prevention efforts.
- Allows the Prevention Providers to record information related their local Prevention plans and efforts.
- Will produce Prevention SA Block Grant reports (required as part of the block grant award) from the data entered by the Prevention Providers.

This Prevention WITS User Guide is intended for the Montana Prevention Providers and Specialists who will be documenting Prevention Plans, Planned Strategies and associated Strategy Implementations.

Topics covered in this guide include:

- Montana WITS Environments
- WITS Prevention Workflow
- Logging into WITS
- WITS Prevention Plan and Planned Strategies
- Implemented Strategies
- Frequently Asked Questions \ Steps To Resolve

Section 1. Accessing Montana WITS environments

Authorized prevention providers \ specialists will be able to access both a training and production site for Montana WITS Prevention functions. Access to these environments needs to be granted by the WITS Administrators.

1.1 Montana WITS Training Environment

The Montana WITS Training environment is used for:

- User acceptance testing
- Training
- Creation and testing of SSRS reports

The Montana WITS Training site URL: https://mt-training.witsweb.org

1.2 Montana WITS Production Environment

The Montana WITS Production environment is used for:

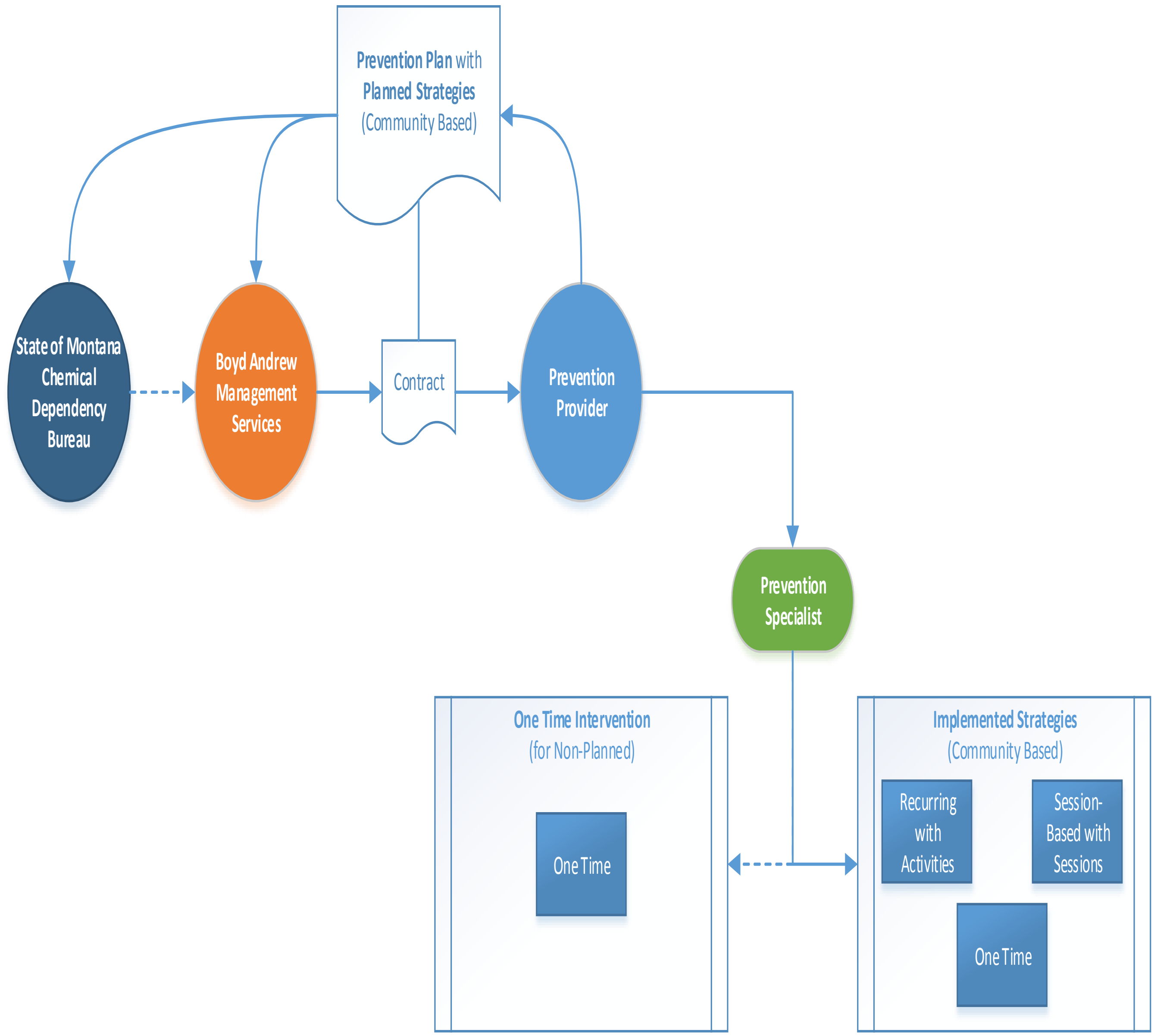
- Implementing Montana's Prevention Data Collection process
- Running SSRS reports

The Montana WITS Production site URL: https:\\mt.witsweb.org

**Note: production site will not be available until late June 2016

Section 2. Montana Prevention Overview

2.1 WITS Montana Prevention Process Flow



2.2 WITS Prevention Terminology

Item	Definition / Guideline
WITS Activities	Steps taken to implement a strategy with a WITS recurring frequency type.
WITS Agency	The legal entity that a provider operates within. Some people refer to this as 'Provider'. In Montana these are the agency providers that hold contracts with Boyd Andrew Management (i.e. Western Montana Addiction Services or District II Drug and Alcohol Services)
Evidence Based Type	Documentation of Evidence-Based Programs, Strategies and Interventions has to meet 1 or more of the following criteria: 1. Evidence based: Inclusion in a Federal List or Registry of evidence-based interventions 2. Evidence based: Being reported (with positive effects) in a peer-reviewed journal 3. Evidence based: Documentation of effectiveness based on the following guidelines
WITS Facility	The location (building) that an Agency / Provider uses to provide services or track Prevention Plans. A provider can have more than one facility. In Montana, this refers to the Prevention Specialist, the County they serve, and the grant funding. i.e. Kim M. at Beaverhead for BG as one Facility and Kim at Beaverhead for PFS as a second Facility.
Goals	Goal statements typically articulate the long-term impact that a community wants to see, such as a reduction in the percentage of young adults who abuse prescription drugs to get high. In Montana, these refer to the "Problem" in the first blue column.
Objectives	Objective statements address the risk, protective and causal factors related to the goal and how a community might reach that goal, such as increasing the awareness of young adults regarding the danger and harm related to prescription drug abuse. In Montana, Objectives are referring to the "Factors" in the first red column
Outcome Indicators	Measures that indicate progress towards reaching goals and objectives. In Montana, "Outcome Indicators" are referring to the "Process" "Impact" "Short" and "Long" term outcome measures in the last 4 columns (Green, White, Red, and Blue respectively).
Socioecological Domain	One or more of five global prevention domains: community, school, family, peer and individual. In Montana, your associated domains can be found in parentheses after the "Factors" you chose from the drop down menu.
Strategy	Interventions, programs and approaches that address goals and objectives. In Montana, "Strategy" is referring to our actual activity and NOT the CSAP Strategy. CSAP Strategy will also be reported and appears by that title in the system WITS Types of Community Based Strategies: 1. <u>**One time**</u> strategy example is a media campaign. Even though

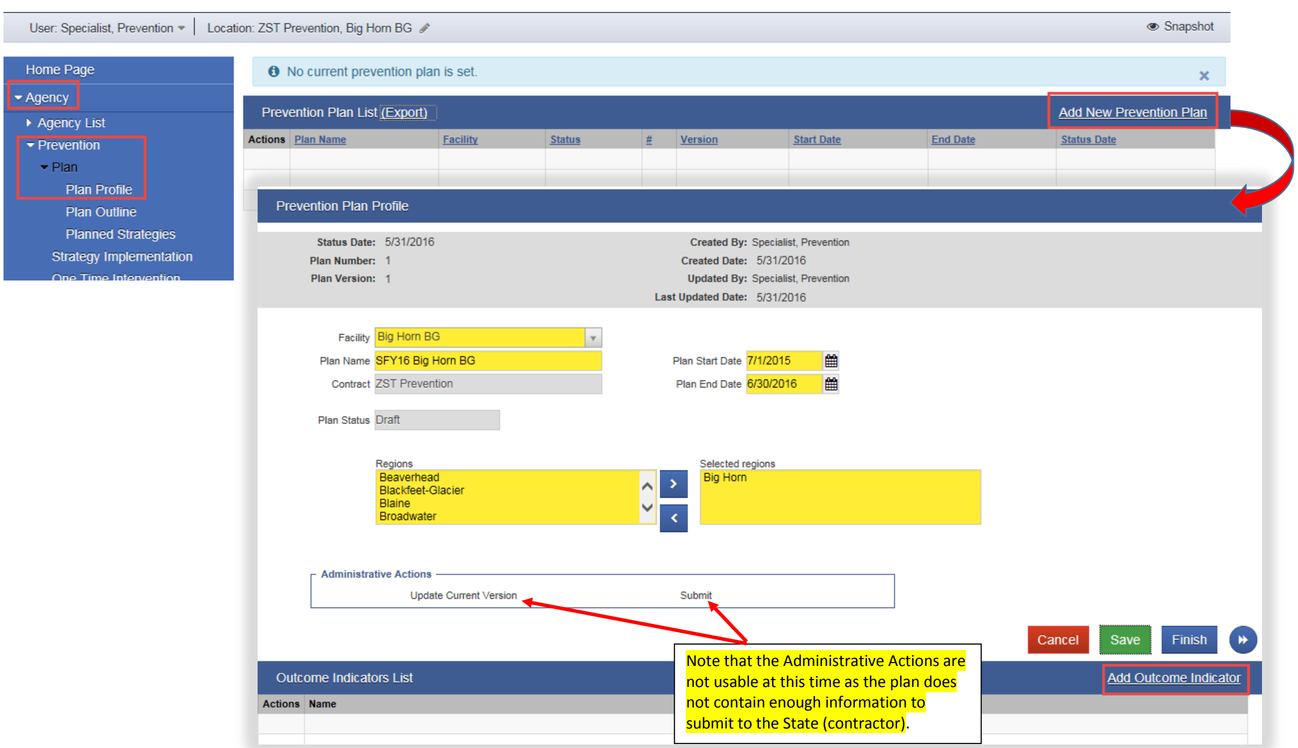
	campaign runs numerous times, it has one primary message (e.g., parents do not allow your kids or their friends to drink at home). 2. **<u>Recurring</u>** strategy example is building community readiness to address nonmedical use of prescription drug use. 3. **<u>Session based</u>** strategy lends itself more towards a curriculum based prevention programs

Section 3. Creating \ Updating the Prevention Plan

3.1 Entering a Prevention Plan

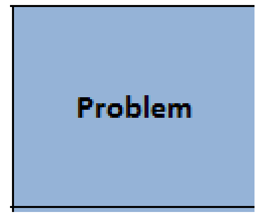
Montana Operational Note: Prevention plans should be set up based on logic models previously created. You may have created two logic models, one for consequence and one for consumption. Both of those will be entered into the same plan in WITS for each county and grant type (e.g. Block Grant, PFS).

1. From the Navigation menu, click on Agency > Prevention > Plan
2. You will be presented with the Prevention Plan List. First time creating a plan there will be no values in the list
3. Click on the *Add New Prevention Plan* link
4. You will be presented with the Prevention Plan Profile
5. Grey Context fields will display the Plan Number and the Plan Version, as well as information on when the plan was last updated.
6. Complete the required fields. The plan start date will be populated from the associated contract effective date but can be overwritten.
7. Ensure that the selected regions reflect only those region\counties that apply for this plan.
8. Plan Status will be 'Draft'
9. Click on the Save button, then click on the Add Outcome Indicator link to start entering outcomes.

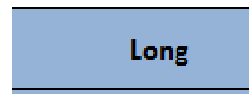


Plan Outcome Indicators and Goals

One plan may have multiple outcome indicators with associated goals and objectives.

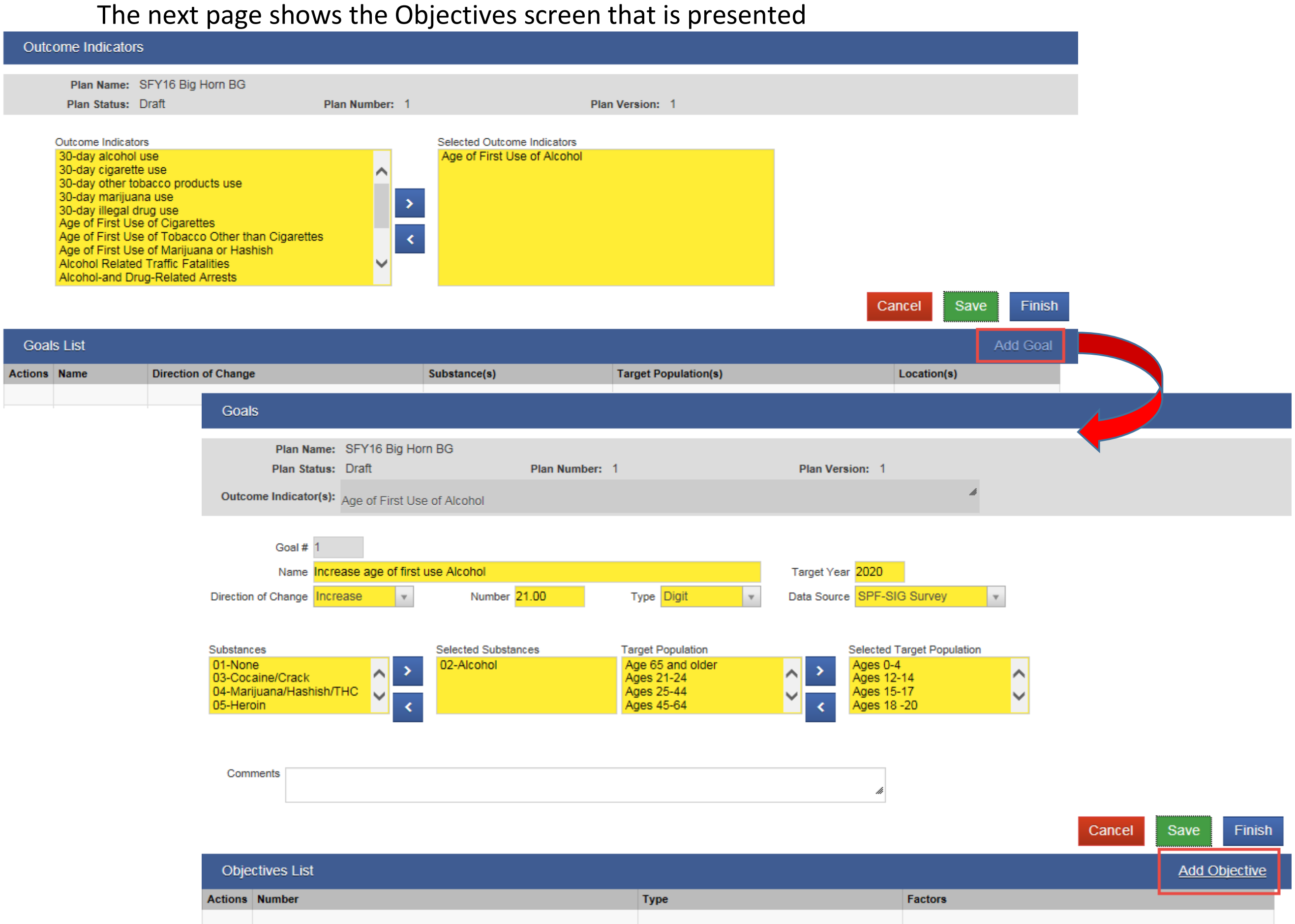


1. On the Outcome Indicators screen select the appropriate values. Notice that the first time you do this – the Goals List has no values.
    a. These "Outcome Indicators" are referring to your Logic Model "Problems" from the first blue column.
2. Click **Save** to save the outcome indicator, and then click the *Add Goal* link
3. You will be presented with the Goals screen. The purpose of this screen is to capture long term goals. Target year typically is multiple years past the time when the prevention plan is implemented.
    a. These "Goals" are referring to the "Long" term outcomes in your Logic Model from the last blue column.



4. Complete required fields and click **Save**
5. Click the *Add Objectives* link

The next page shows the Objectives screen that is presented

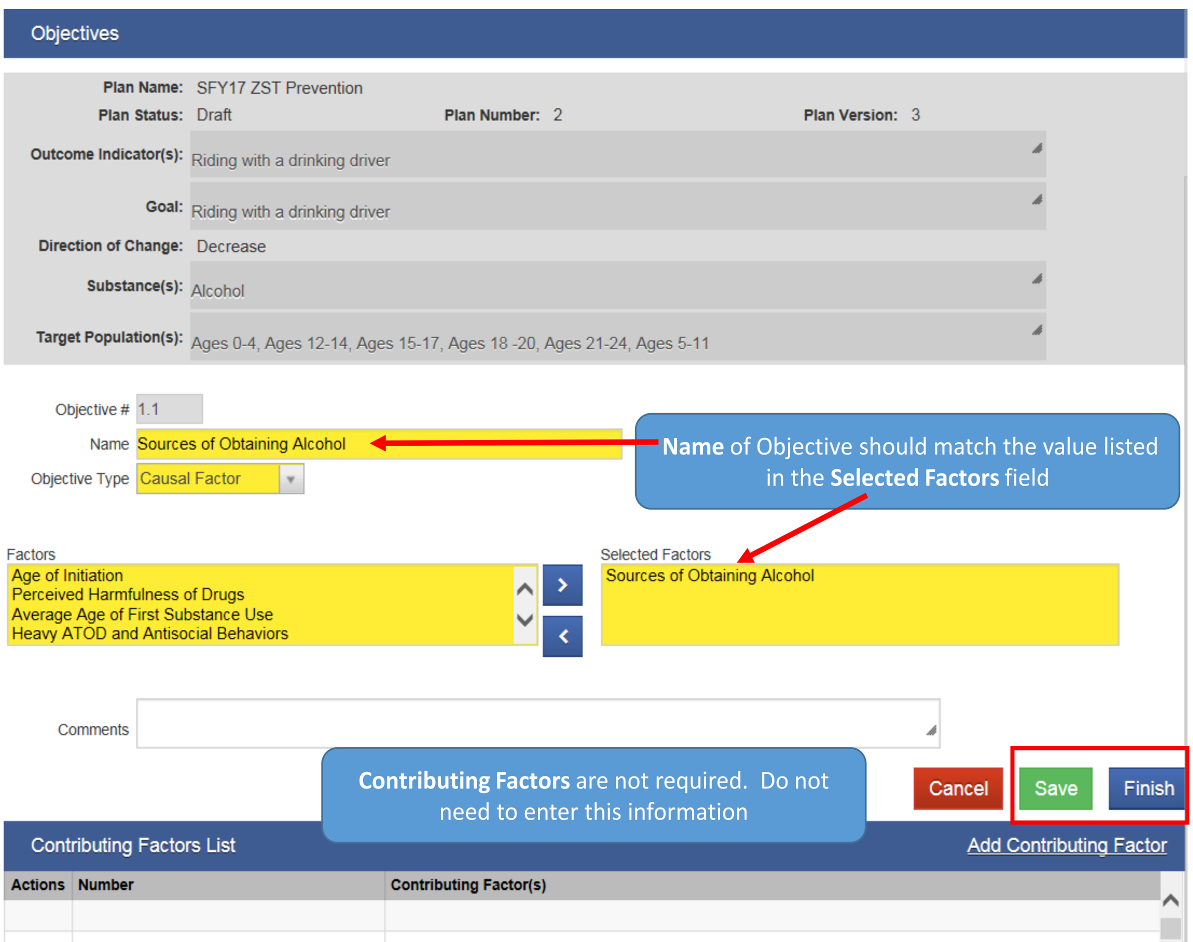


Plan Objectives

There can be many Objectives (Factors) for one Goal ("Long" range outcome) of a Prevention Plan.

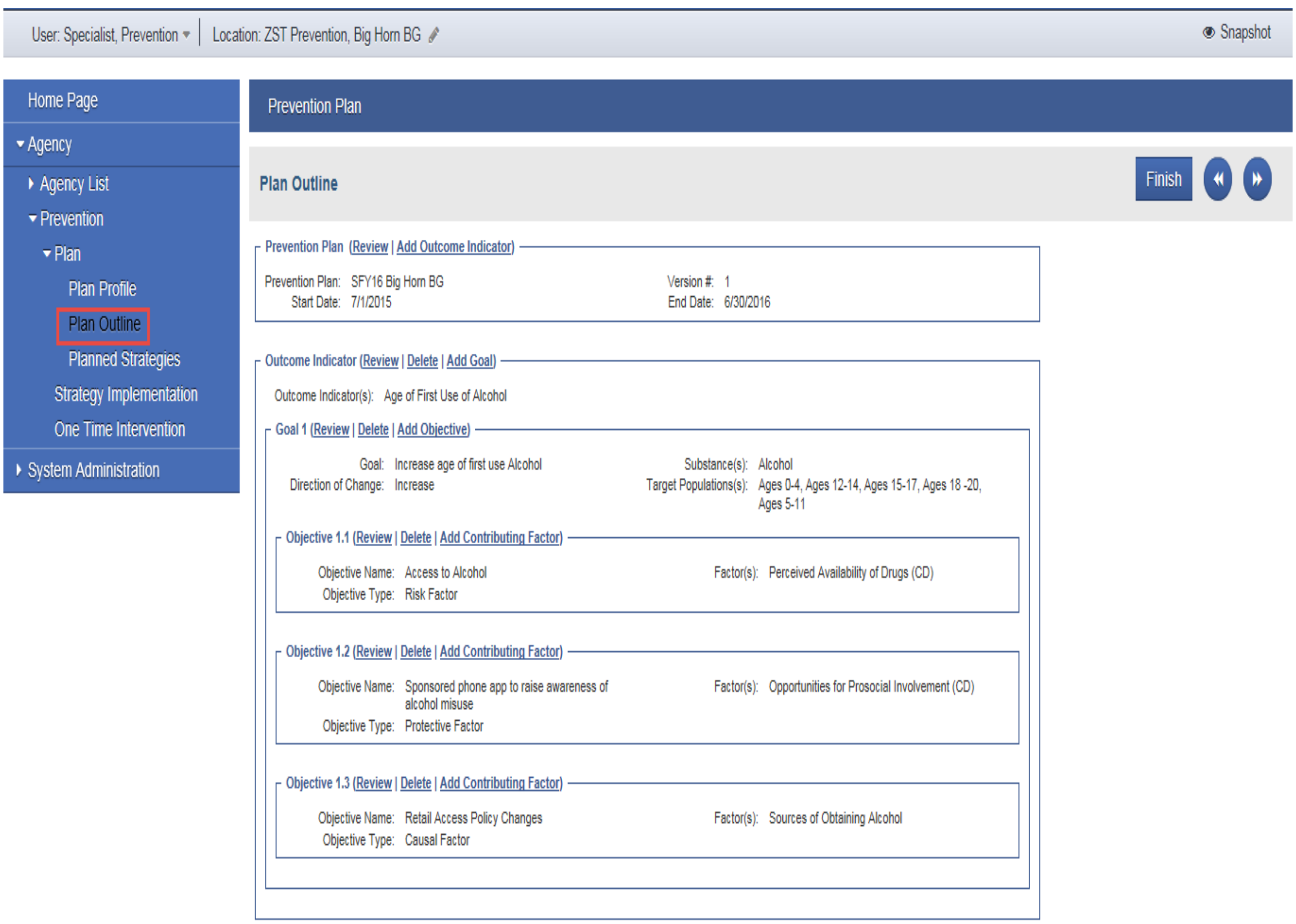
Note: The gray context field at the top of the screen now shows information from the **Goal** that the **Objective** is associated with.

1. Complete any required field and comments you may have for this objective.
   a. In Montana, the "Name" should be identical to the Risk Factor/Protective Factor/Causal Factor.
   b. Additionally in Montana, there should be ONLY ONE "Selected Factor" for each "objective"
2. Objective Type has 3 values; this content is part of the Code Tables maintained by the State.
   - Risk Factor (RF in logic model)
   - Protective Factor (PF in logic model)
   - Causal Factor (CF in logic model)
3. Choose the values that are the most appropriate for this objective.
4. Click on Save or Finish to save your Objective. Finish will return you to the Goals and Objectives List screen



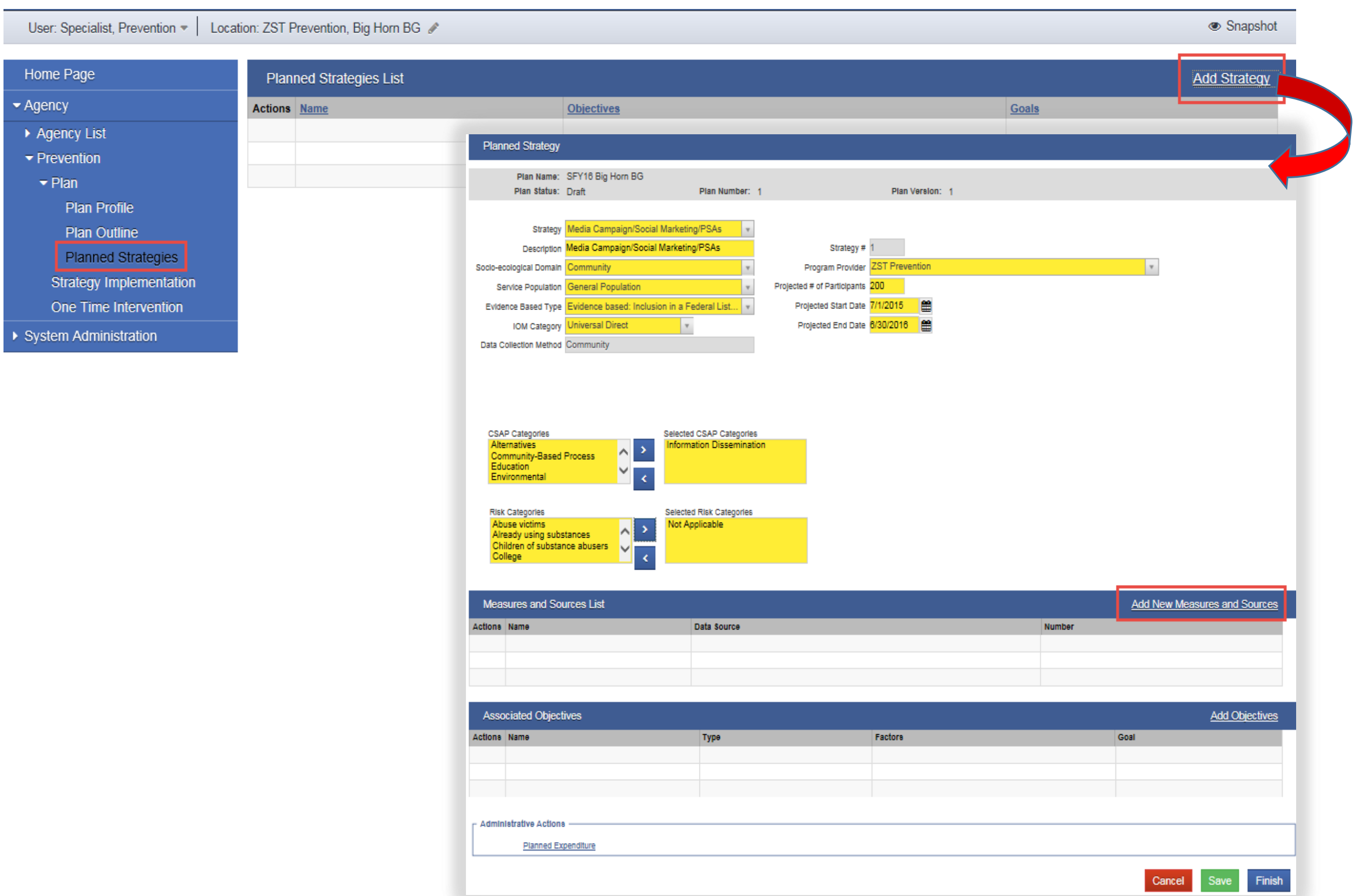
3.2 Prevention Plan Outline

1. From the navigation menu click ***Agency > Prevention > Plan > Plan Outline*** to view the Prevention Plan Outline screen.
2. The Prevention Plan Outline provides an easy to use outline to populate your Prevention Plan with information.
3. The **Review** link is used to review existing information.
4. The **Delete** link is used to delete information that is no longer relevant.
5. The **Add Outcome Indicator** link is used to add a new outcome indicator to the plan.
6. The **Add Goal** link is used to add a new goal to the associated Outcome Indicator.
7. The **Add Objective** link is used to add a new objective to the associated goal.



3.3 Entering Planned Strategies (remember that in Montana, these "Strategies" are the "activities" from your Action Plan and NOT the CSAP Strategies from your Logic Model)

1. From the navigation menu, click **Agency > Prevention > Plan > Planned Strategies**
2. The Planned Strategies List screen will display. Click on the *Add Strategy* link
3. You will be presented with the Planned Strategy screen
4. The **Strategy** selection values are determined by the State.
5. The **Program Provider** will default to the Prevention Provider keying the planned strategy.
6. **Projected Start Date** and **Projected End Date** must fall within the dates of the Plan start & end date.
   a. In Montana, the **Projected Start Date** should match the start date of the plan
7. **IOM Category** will drive the values for **Data Collection Method. IOM Category** values of Universal Direct or Universal Indirect will set **Data Collection Method** to Community and read only. A value of Indicated will set the Data Collection Method to Individual with option to change.
8. Complete remaining required fields and click the **Save** button to save the Planned Strategy.
9. Click on the Add New Measures and Sources link to capture Measures\Sources for this Planned Strategy

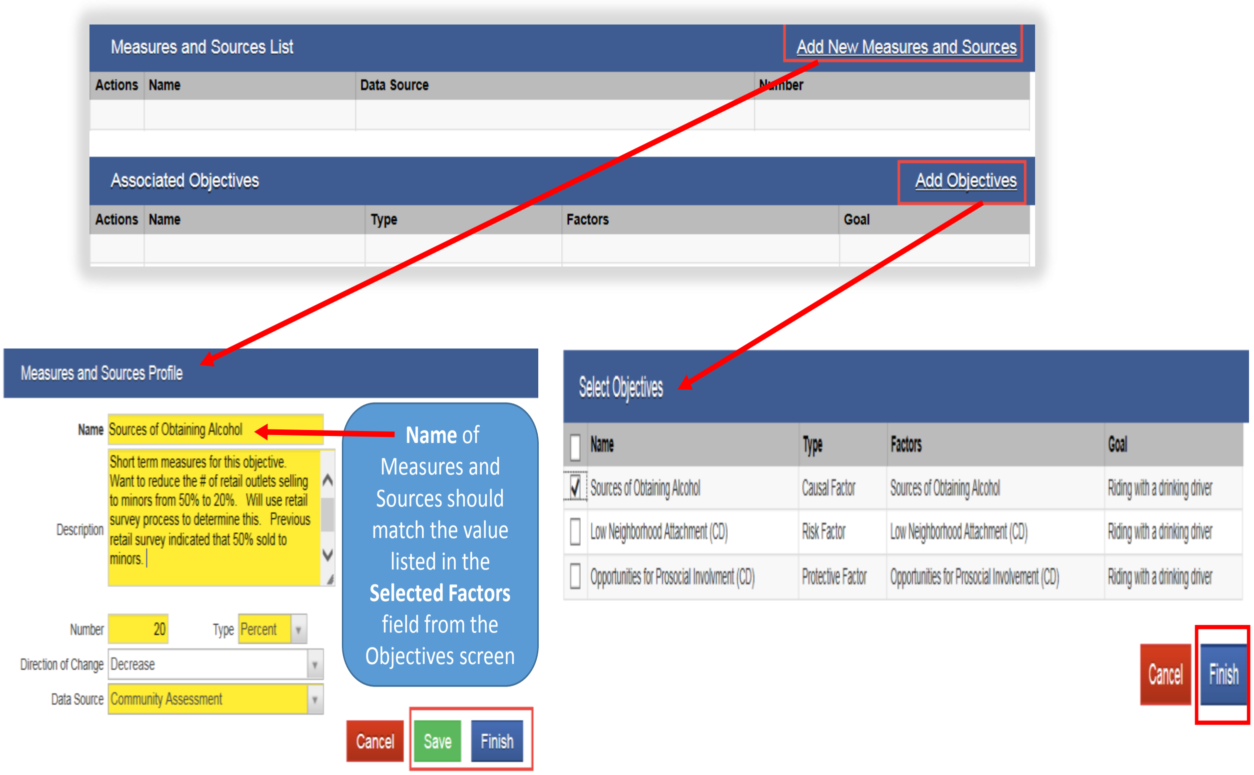


Measures and Sources \Associate Objectives With Planned Strategies

1. From the Planned Strategy screen, in the Measures and Sources List section - click on *Add New Measures and Sources* link.
2. You will be presented with the Measures and Sources Profile. Enter the information on measures that will be done for this planned strategy.
    a. In Montana, you must copy and paste your Short term outcome(s) from your Logic Model into the "Description" box on this page.
3. Click on the Finish button to be returned to the Planned Strategy screen.

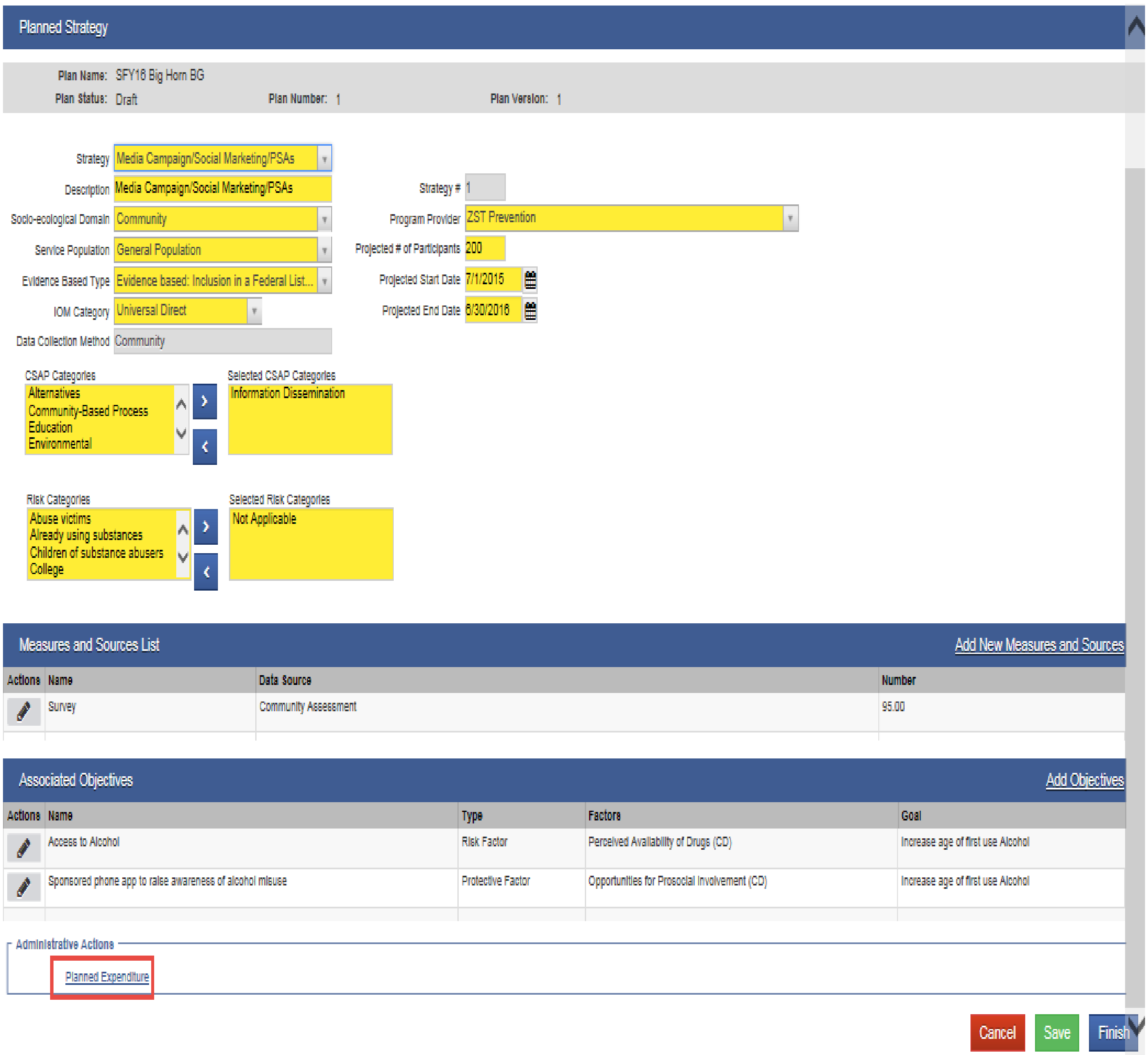
** Montana Operational Note: This information is captured for **short term** outcomes (e.g. Gather 8 pounds of drugs from a RX take back event, see a percentage change in pre/posttests, etc.)

4. From the Planned screen, in the Associated Objectives section, click on *Add Objectives* link.
5. You will be presented with the Select Objectives screen. These objectives came from the Plan Profile / Plan Outline.
6. Check off the Objectives that apply to this Planned Strategy and click the Finish button.

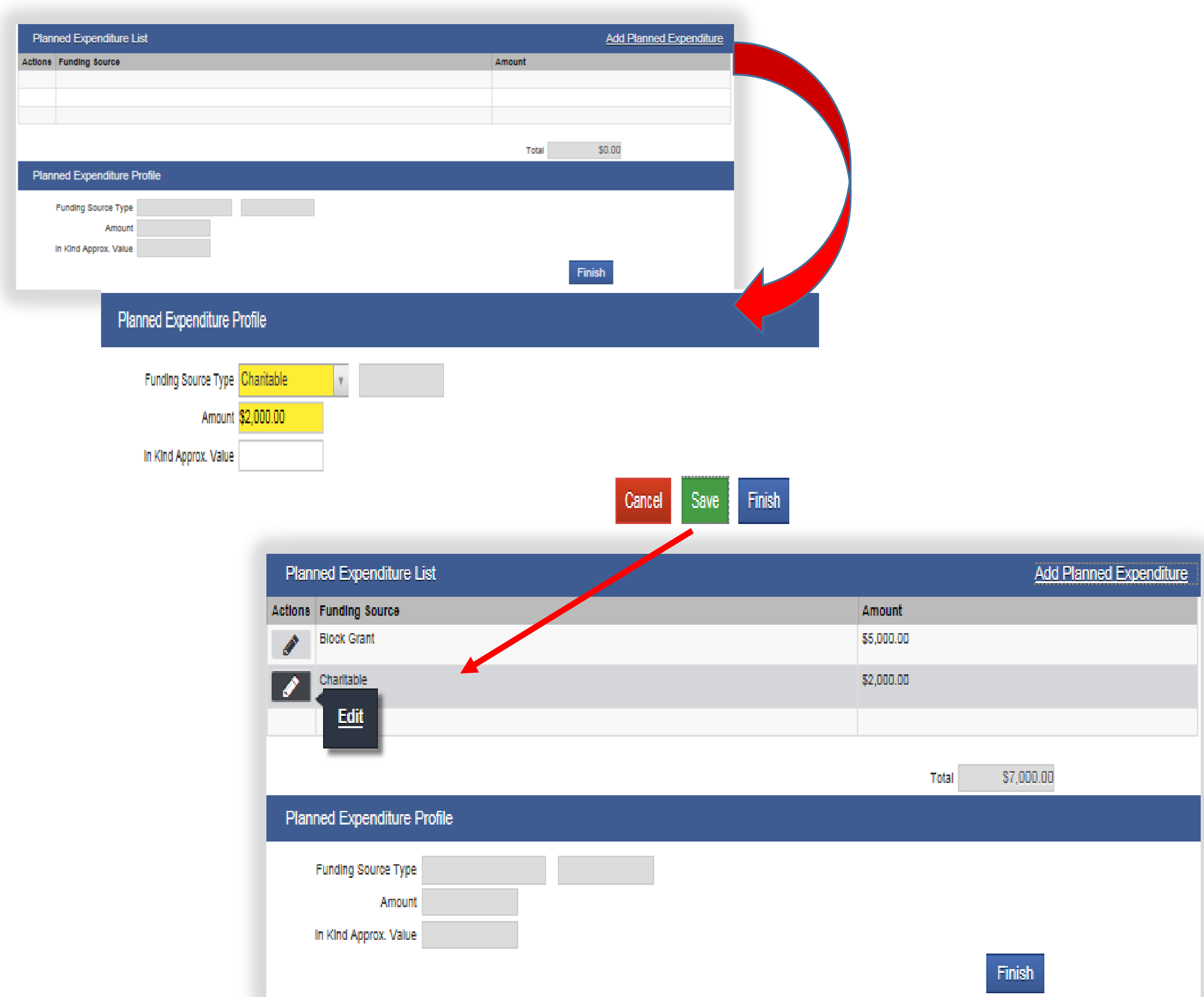


Entering Planned Expenditures

1. After entering Measures and Sources, and associated Objectives with your planned strategy, the information will appear as below.
2. Click on the **Save** button
3. Click on the Planned Expenditures link in the Administrative Actions box at the bottom of the screen to start entering planned expenditures for this strategy.



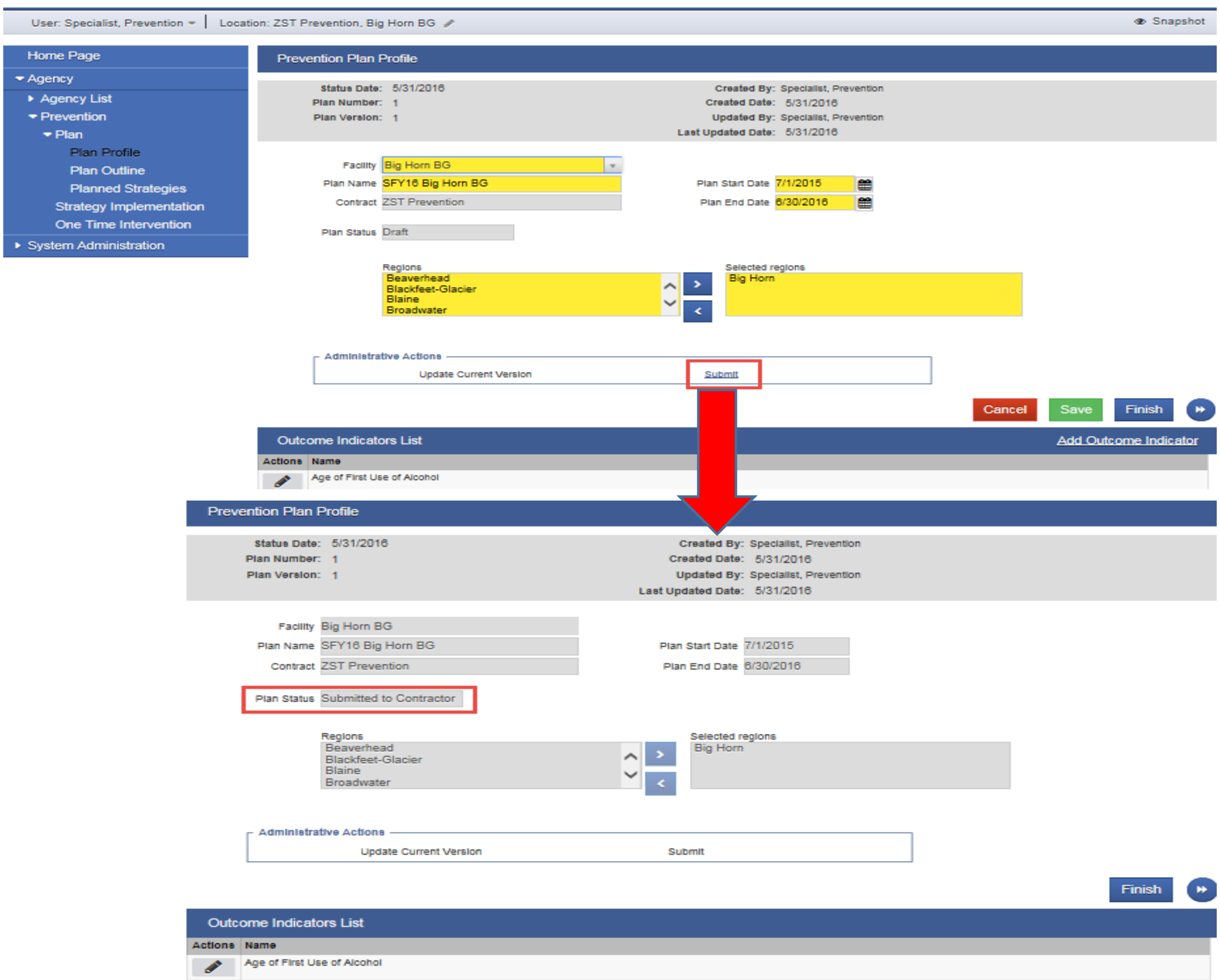
1. You will be presented with the Planned Expenditure List. Use this to list your planned expenditures for this planned strategy. Planned expenditures will drive the Actual Expenditures on the implemented strategies – that information is used for Block Grant reporting.
2. Click on the *Add Planned Expenditure* link to add a new value.
3. You will be presented with the Planned Expenditure Profile. **In Kind Approx. Value** is where you list approximate amounts for donated monies or services.
4. The Funding Source Type drop down values are established by the State.
5. Complete required fields and click the **Save** button. The system will calculate a new **Total** for **Planned Expenditures** for this **Planned Strategy.**
6. If you wish to update an existing **Funding Source**, hover the cursor over the Actions pencil icon on the associated row and click on the Edit link.



3.4 Submitting Plan to BAMS

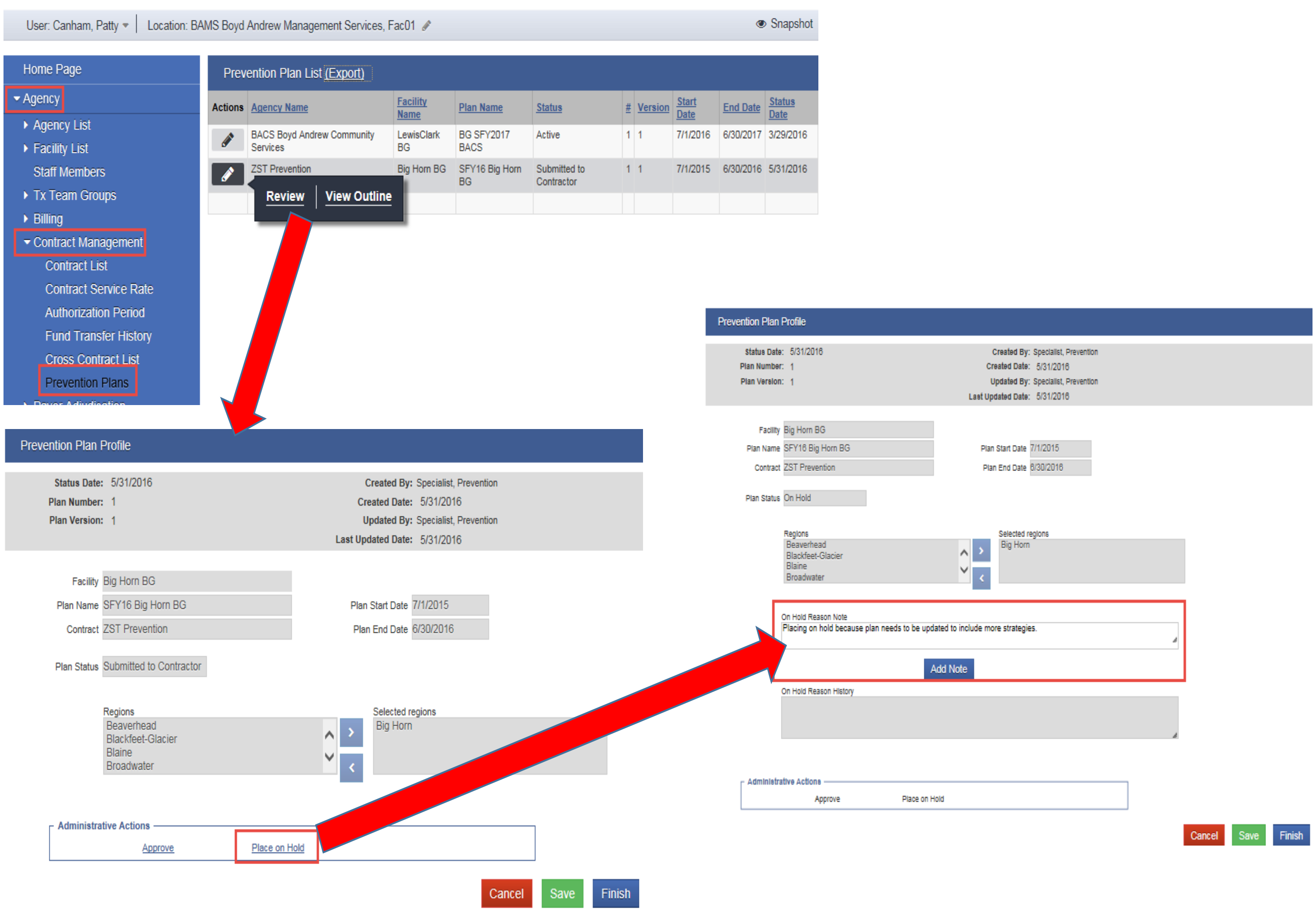
Now that the Prevention Specialist has completed the Prevention Plan and Planned Strategies – they have the ability to submit this info to BAMS - Boyd Andrews Management Services for review.

1. From the left navigation menu click on **Agency > Prevention > Plan** and select the plan that is ready to be sent to BAMS (State Contractor).
2. In the Administrative Actions, now have the ability to Submit as both the Plan and associated Planned Strategies are in place.
3. The Prevention Specialist clicks on Submit.
4. They system will change the status from 'Draft' to 'Submitted to Contractor'.
   - An email will be sent to the BAMS contact listed on the Prevention Provider's prevention contract that a plan is awaiting review.
   - The Prevention Specialist **can no longer update that version of the plan or planned strategies**– all fields will be grayed out



3.5 BAMS Review of Plan

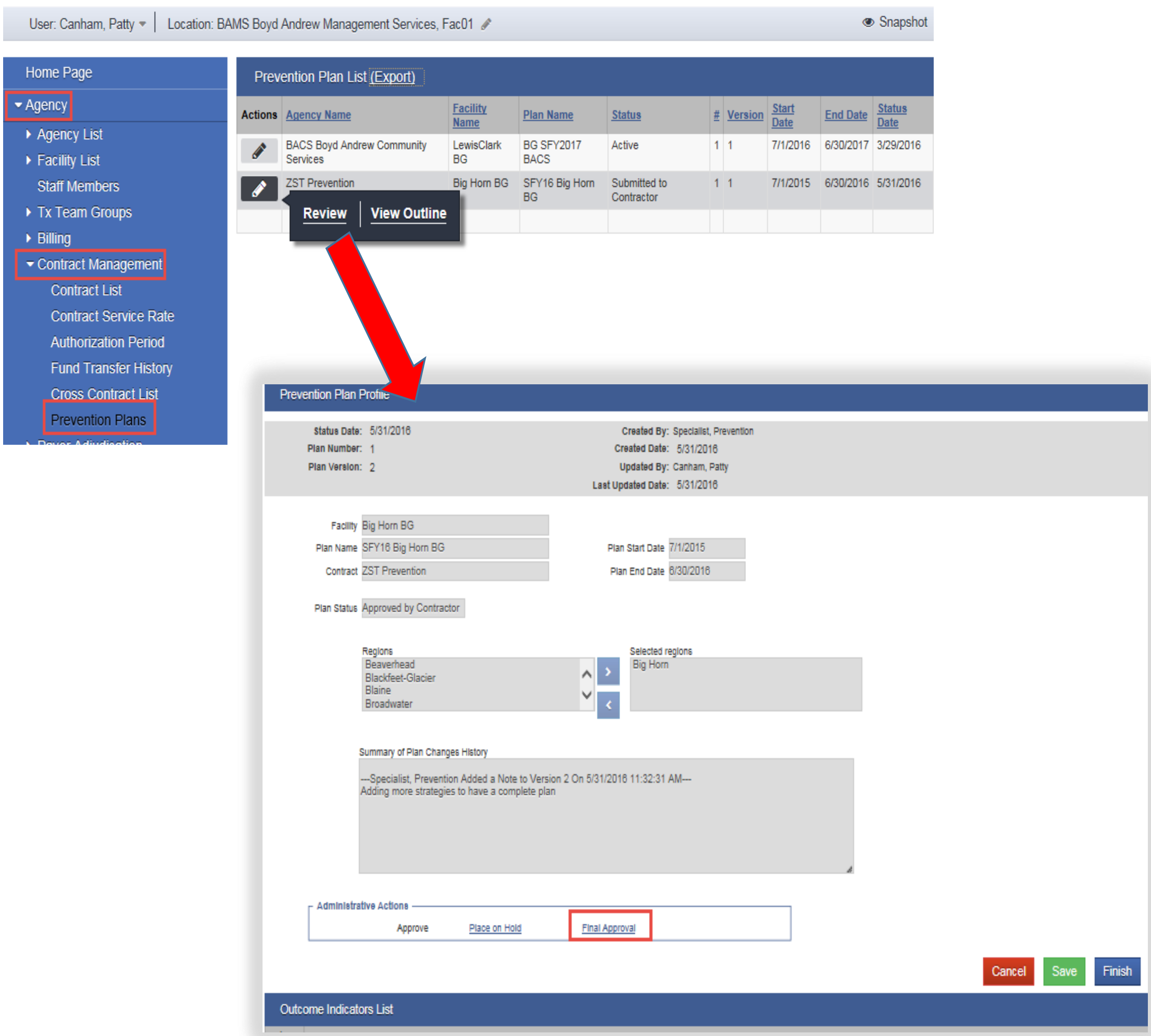
01. BAMS will click on Agency > Contract Management > Prevention Plans to view status of plans from Prevention Providers.
02. BAMS will be presented with the Prevention Plan List.
03. BAMS can use Actions links to review the Prevention Provider's submitted plan.
04. If BAMS is ready to approve, then they will click on the Approve Administrative Action.
    - This will change the plan status to "Approved By Contractor".
    - BAMS will verbally communicate to the State that the plan is ready for the final (2nd level) of approval.
05. If BAMS is not ready to approve, then can use the Place on Hold Administrative Action to send concerns back to the Prevention Provider to address.
    - This will cause the "On Hold Reason Note" field to appear. BAMS will enter information that the Prevention Specialist needs to do before submitting the plan again.
    - Then BAMS needs to click on the Add Note button to ensure the notes become part of the plan history.
    - An email will be sent to the Prevention Provider's email contact (if listed) on the contract with this information. Contacts will be updated by the CDB Prevention Program Manager.
    - The status of the Plan will be "On Hold".



3.6 State Review \ Approval of Plan

State staff with the access role of d "Final Prevention Plan Approval" will be able to approve the prevention plans.

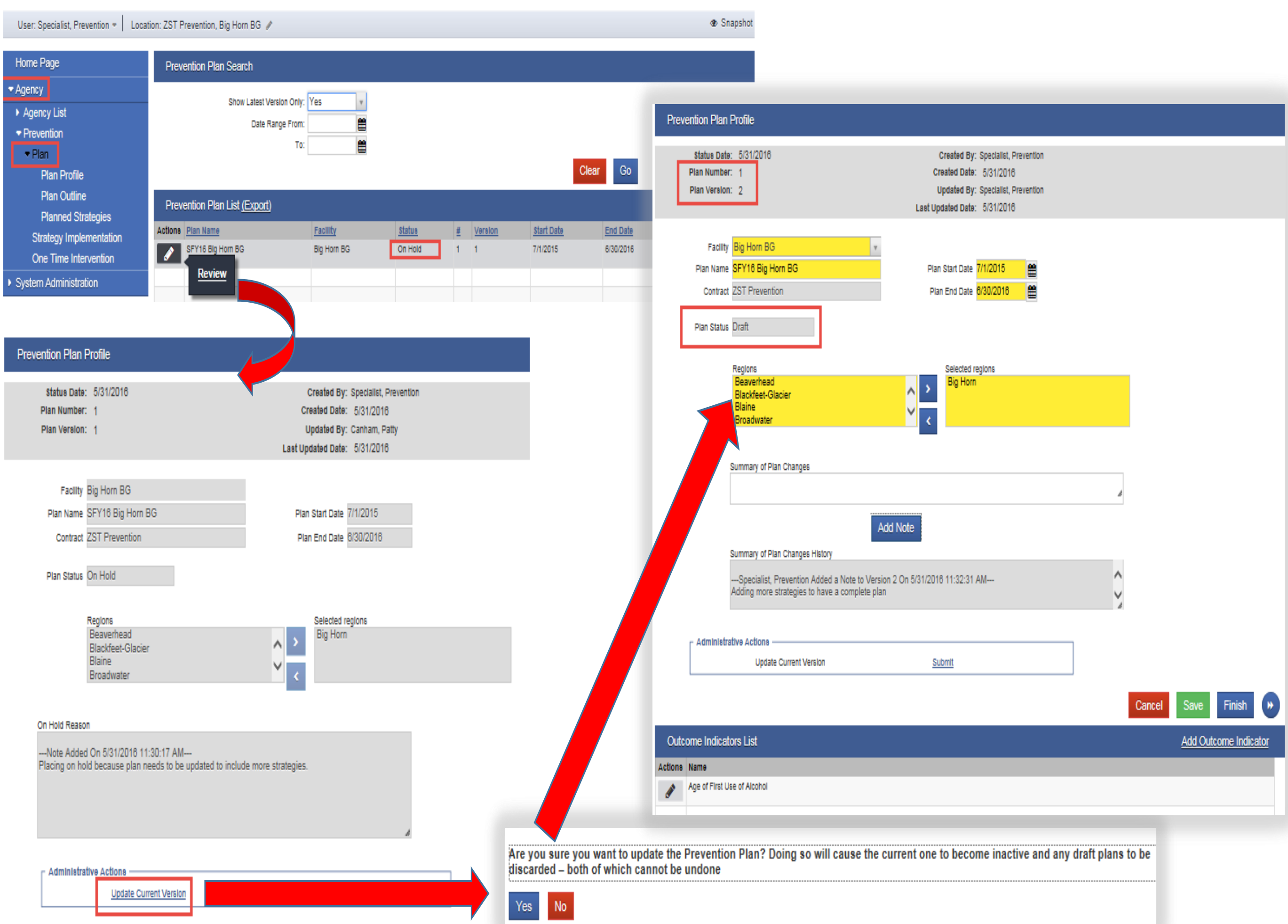
1. The State staff will be in the context (location) of BAMS and from the left navigation menu click on Agency > Contract Management > Prevention Plans. Will be able to review the plan that needs final approval by hovering the cursor over the Actions Pencil icon and clicking on Review.
2. The Final Approval link will appear in the **Administrative Actions** box at the bottom of the Prevention Plan Profile screen.



3.7 Creating a new verison of the Plan

After the Prevention Provider receives the email notifying them that Prevention Plan is on hold – they go into WITS to **Agency > Prevention > Plan.**

1. In the **Prevention Plan List** – can see the 'On Hold' status.
2. Hover the cursor over the Actions pencil icon and click on the Review link.
3. The Prevention Plan Profile will be presented.
4. The Prevention Specialist then clicks on Update Current Version under **Administrative Actions**.
5. This will cause a prompt message "Are you sure…" to appear, click on the Yes button.
6. This will cause a new version of the plan to be created with a Draft status that the Prevention Specialist can update. Note that both the plan version and the plan status have changed. The Prevention Specialist will need to update the plan \ planned strategies and re-submit for approval
7. Implemented strategies can't be created until there is an active verison of the plan.



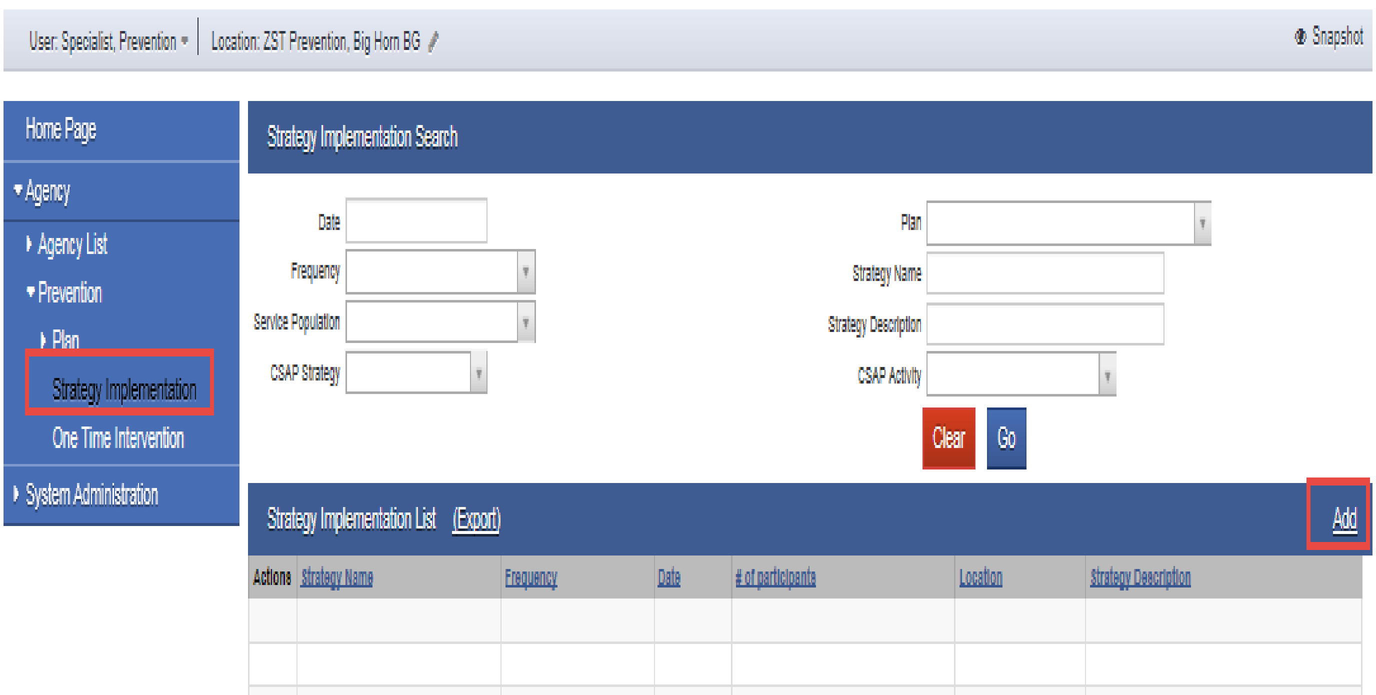
Section 4. Implemented Strategies – Community Based

4.1 Creating Community Based Implemented Strategies

1. Once a prevention plan has received all approvals and is in an "Active" status, the associated Community Based Implemented Strategies are created by clicking on **Agency > Prevention > Strategy Implementation** from the left navigation menu.

2. The Strategy Implementation Search and Strategy Implementation List sections are presented.

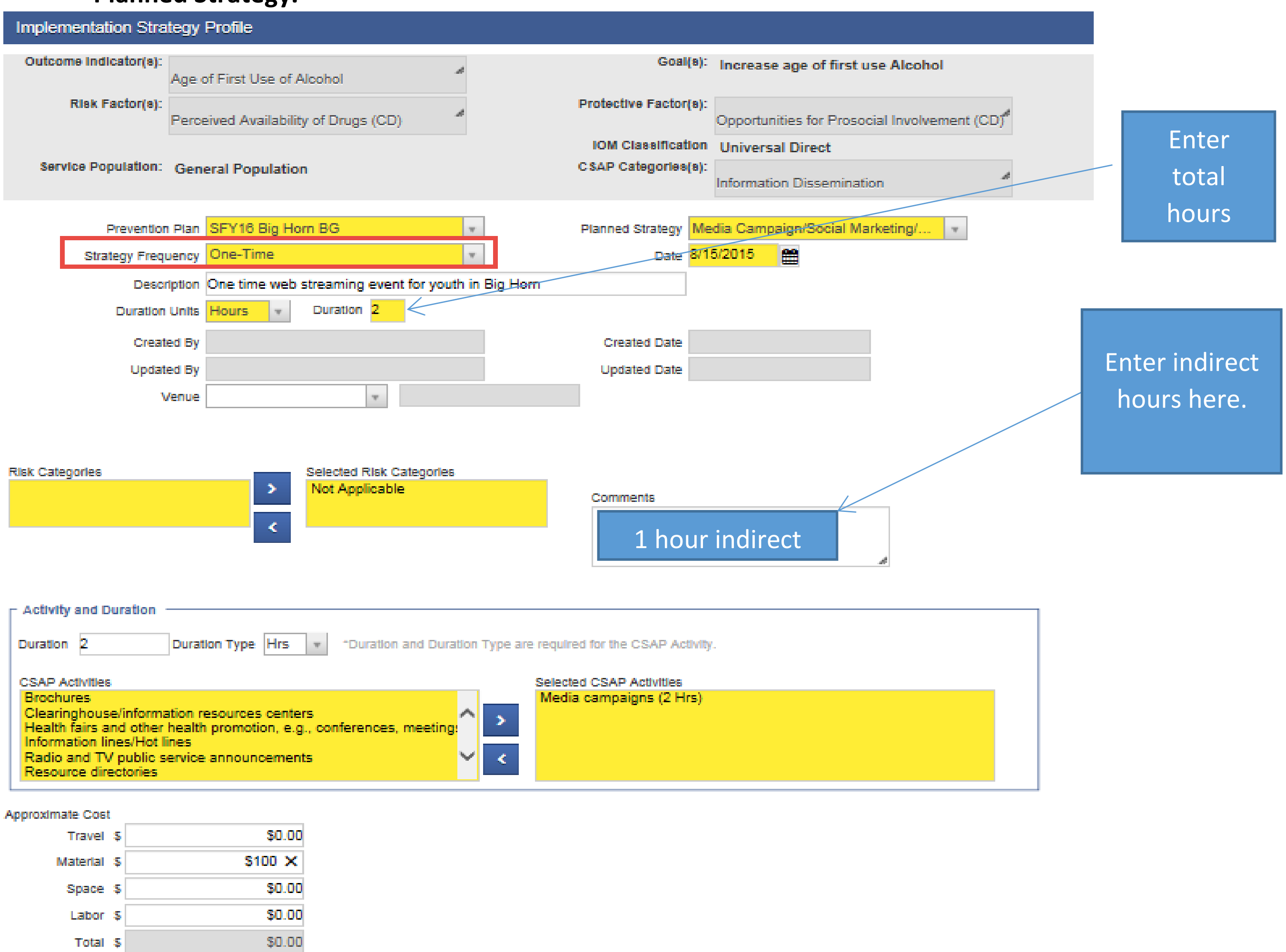
3. Click the Add link to add a new Strategy Implementation. You will be presented with the Implementation Strategy Profile screen (see next page).



4.2 One Time Frequency

A **One Time** frequency is used to capture strategy implementations that occurred one time. May see this for health fairs, speaking engagements, etc.

1. Choose a **Prevention Plan**, which will filter the **Planned Strategy** dropdown. When you select the **Plan** and **Planned Strategy** values that apply, the gray context information will be populated.
2. **Date** must fall within the dates of the selected Prevention plan
3. Enter the **Duration Units** and **Duration**. These values are compared to the entries made in the **Selected CSAP Activities** field – they need to match or you cannot save the record.
4. You must include any portion of the duration field that is indirect in the comments section as a number. i.e. "2.5 hours"
    a. This means that if you spent 6 hours on the intervention including prep and the actual intervention combined, but you spent 3 hours preparing, you would put 6 (total hours) in the "duration" box and "3 hours" in the comment box to reflect the indirect time.
5. Enter the **Approximate Cost** fields. The total Approximate Cost of all the **Implemented Strategies** should not exceed the total of the **Planned Expenditures** done on the associated **Planned Strategy.**



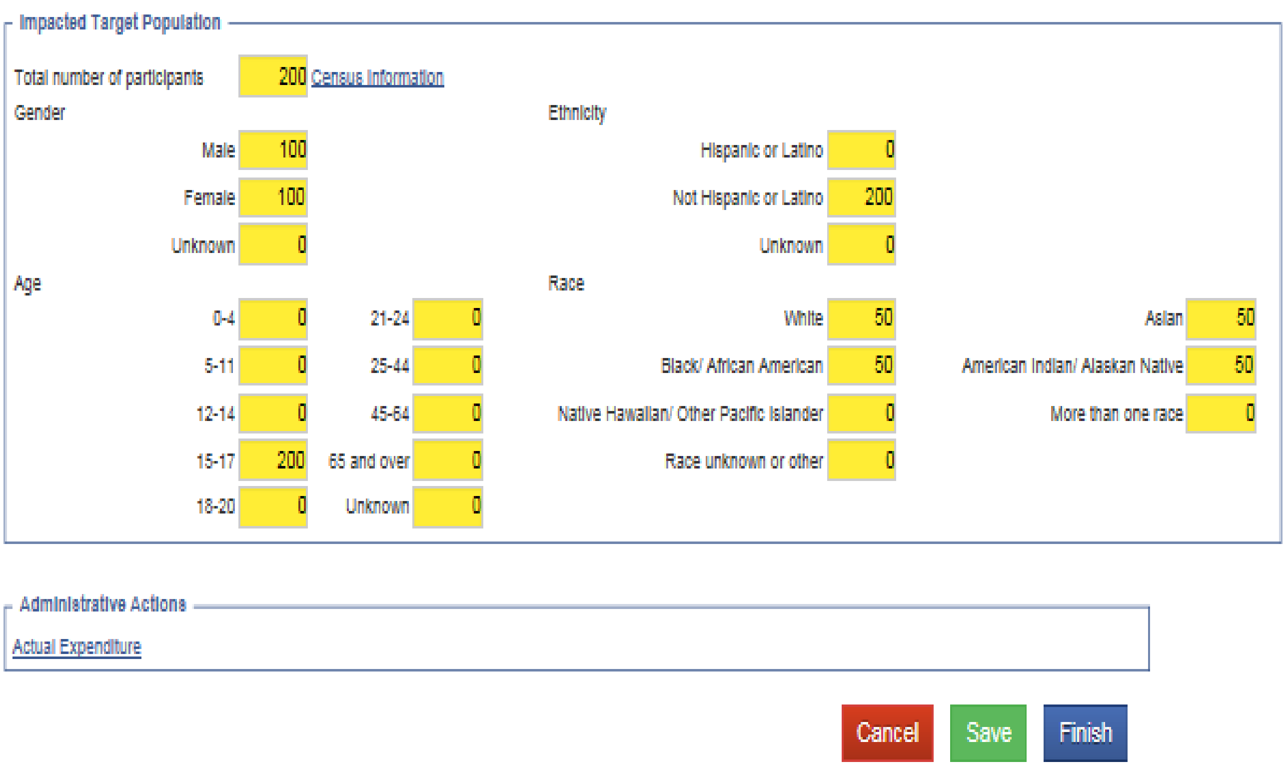
6. Enter the total (approximate) number of participants.
7. Using the grid, divide the same number of participants by:
    a. Gender
    b. Age
    c. Ethnicity
    d. Race

Approximate these counts as necessary.

8. When finished, click on the **Save** button.

NOTE: The total number of participants, as well as all breakouts by gender, age, ethnicity and race, must total the same number.

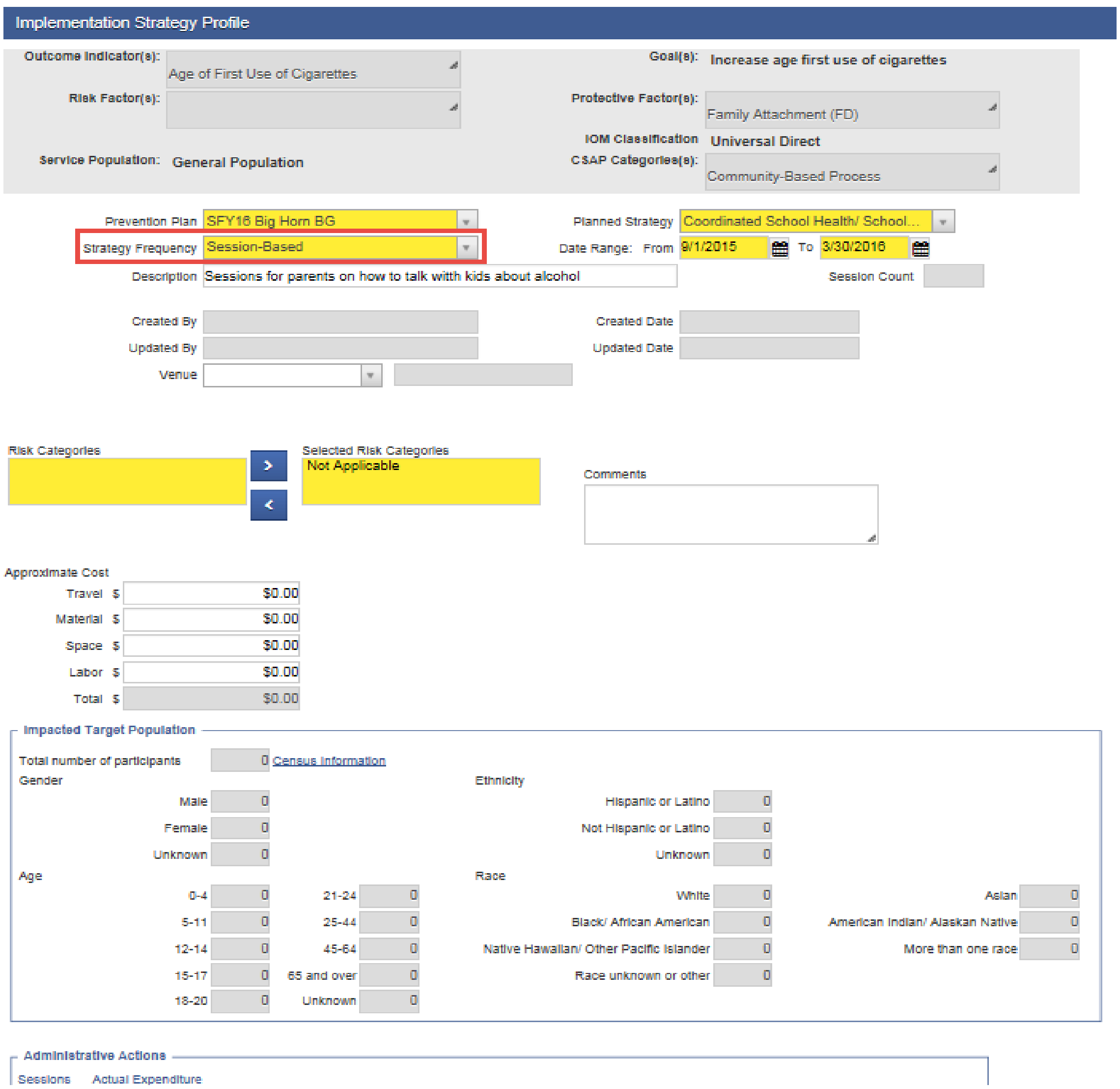
CENSUS INFORMATION: If you are working in a town or larger area, you may click the "Census Information" link, which will open a new browser for the census website. You may obtain info from this website to type into WITS; then close the window



4.3 Session Based Frequency

Session-based strategies are much like one-time strategies, except that they will have certain fields captured on the profile screen, and other fields captured at each session. The differences are outlined in red

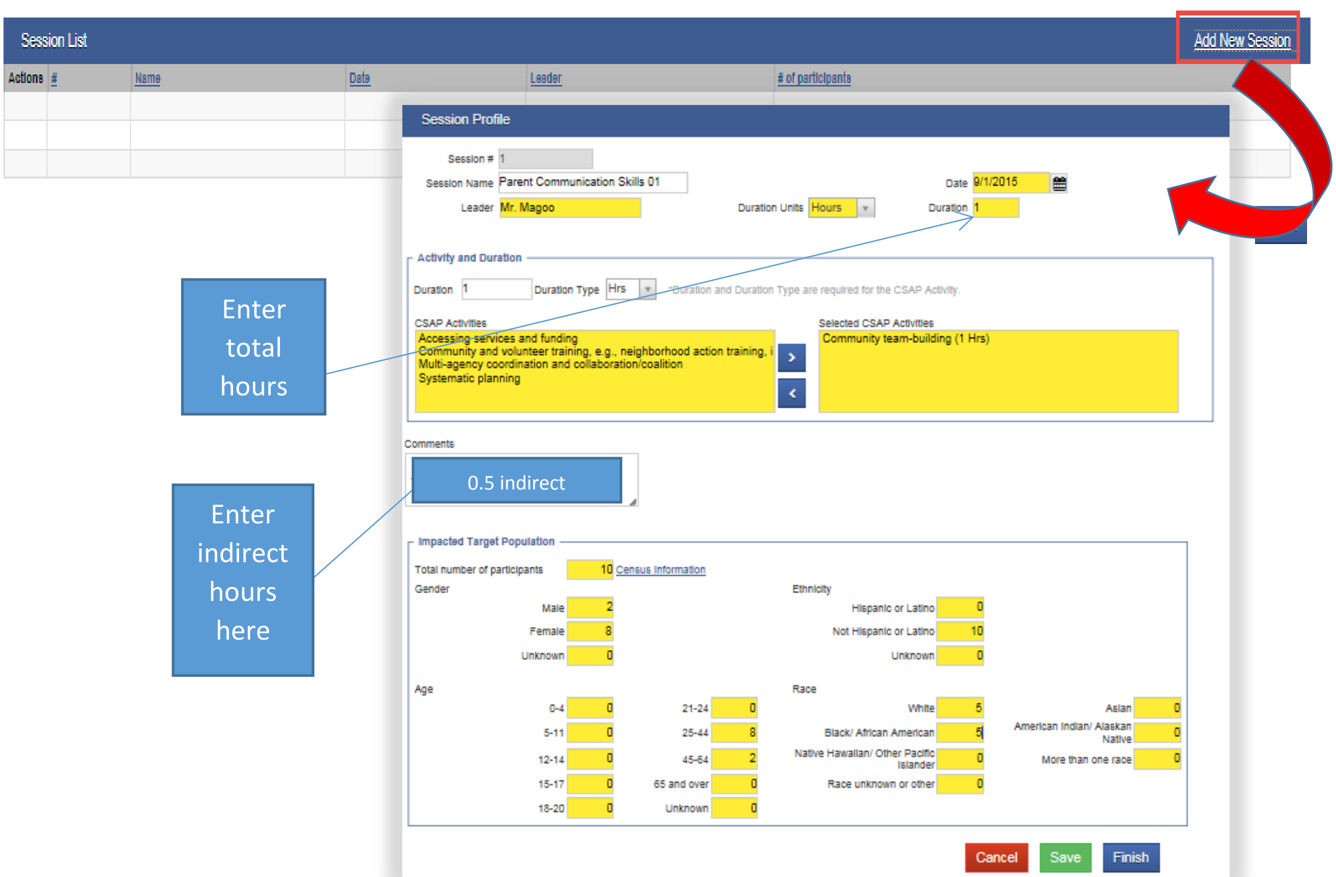
1. Choose a **Prevention Plan**, which will filter the **Planned Strategy** dropdown.
2. **Date Range** must fall within the dates of the Prevention plan.
3. Participant information will be populated from the Sessions screen. The Session with highest number of participants will have its population count appear here. This is to avoid duplicating participants for reporting.
4. After completing required fields click on the **Save** button.
5. Then click on the Sessions Administrative Action.



6. You will be presented with the Session List screen
7. Click on the *Add New Session* link
8. You will be presented with the Session Profile Screen
9. **Selected CSAP Activities** are validated against the **Duration** and **Duration Units** fields.
10. You must include any portion of the duration field that is indirect in the comments section as a number. i.e. "2.5 hours"
    a. This means that if you spent 6 hours on the intervention including prep and the actual intervention combined, but you spent 3 hours preparing, you would put 6 (total hours) in the "duration" box and "3 hours" in the comment box to reflect the indirect time.
11. Enter the total (approximate) number of participants.
12. Using the grid, divide the same number of participants by:
    a. Gender
    b. Age
    c. Ethnicity
    d. Race

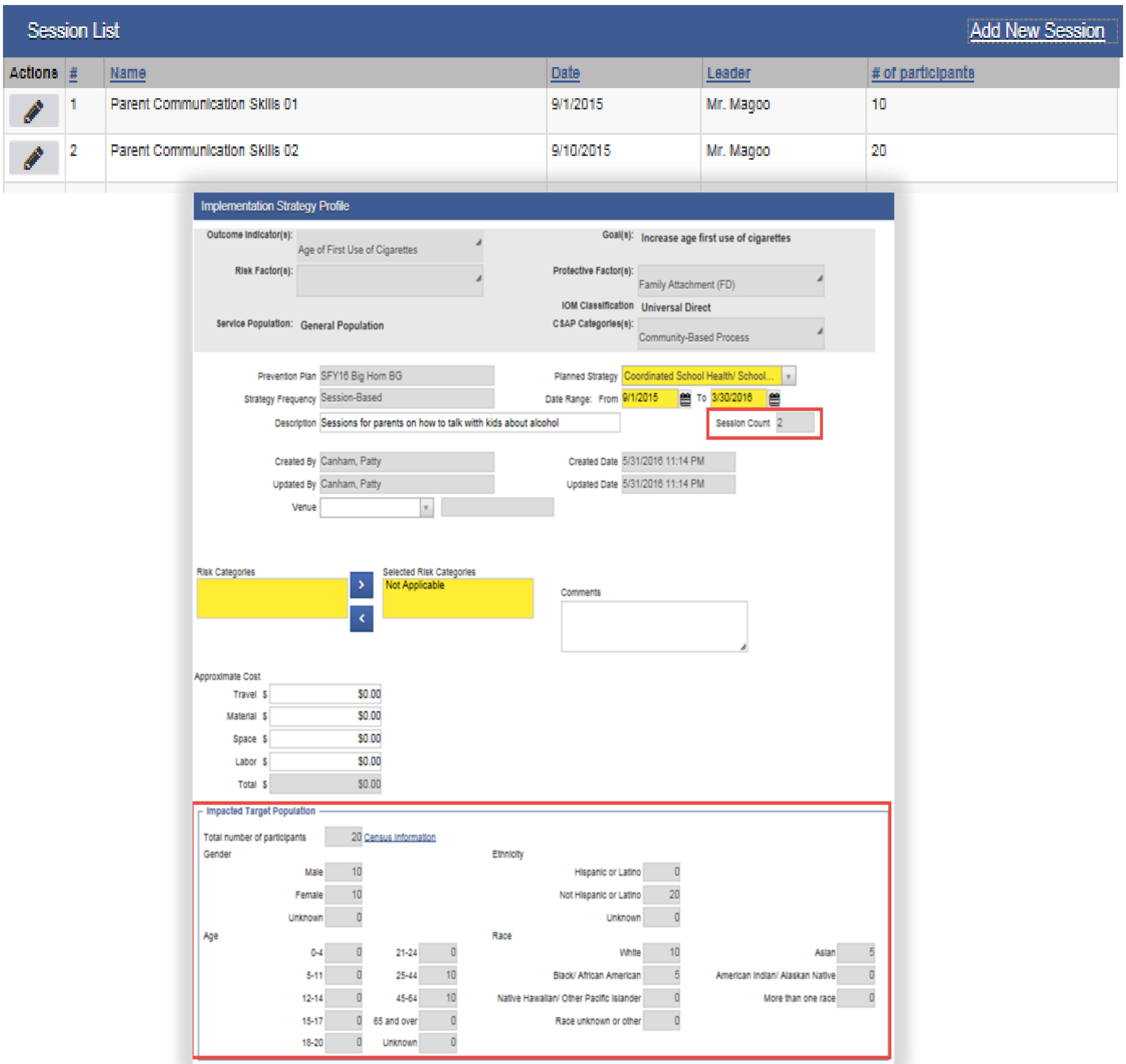
13. When finished, click on the **Save** button.

NOTE: The total number of participants, as well as all breakouts by gender, age, ethnicity and race, must total the same number.



14. The **Session Count** on the Implementation Strategy Profile is calculated by the system. It adds up all the sessions that appear in the Session List

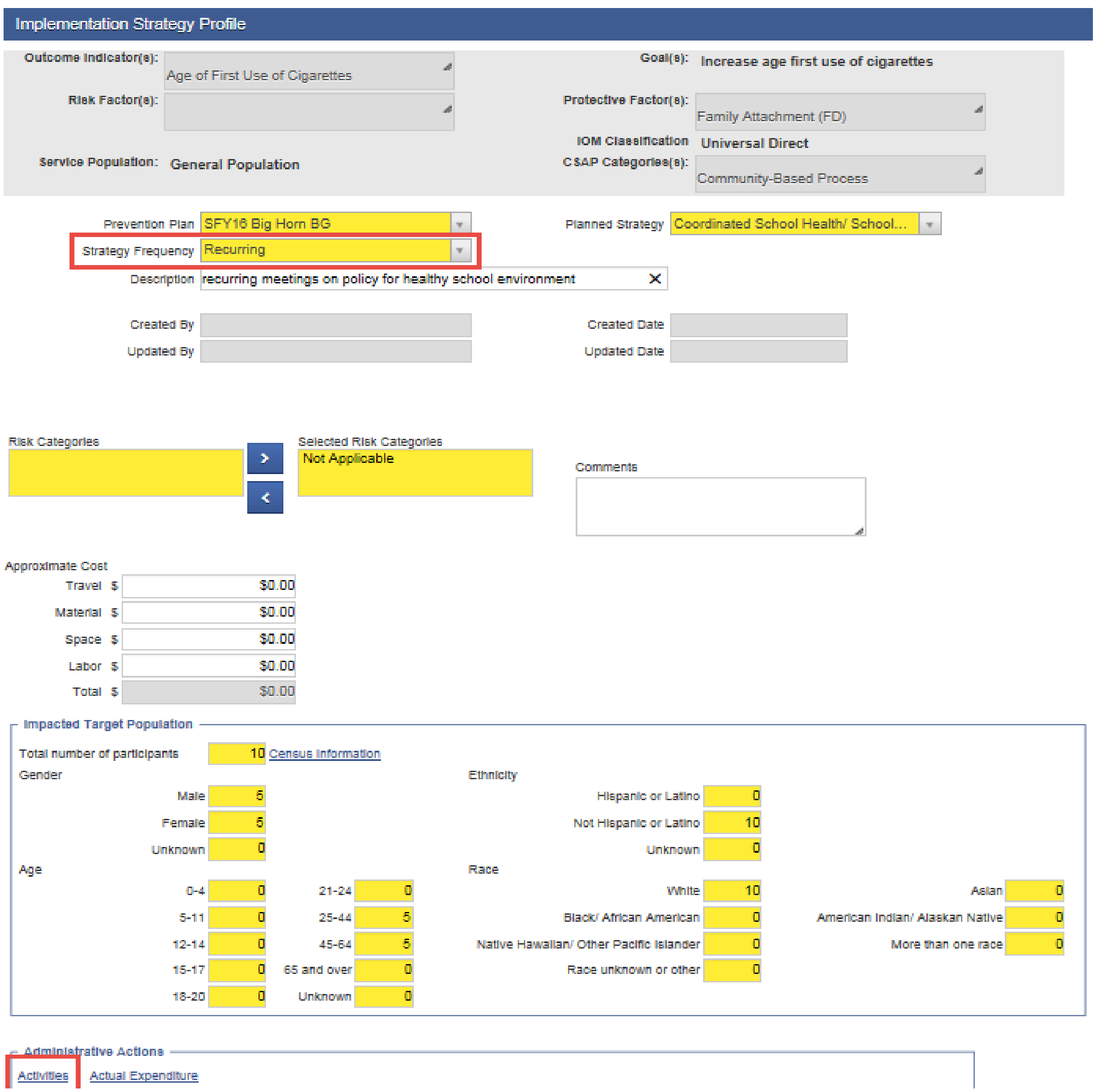
15. The **Participant** and demographic counts on the Implementation Strategy Profile now match the **Participant** and demographic counts for the session that had the highest # of participants



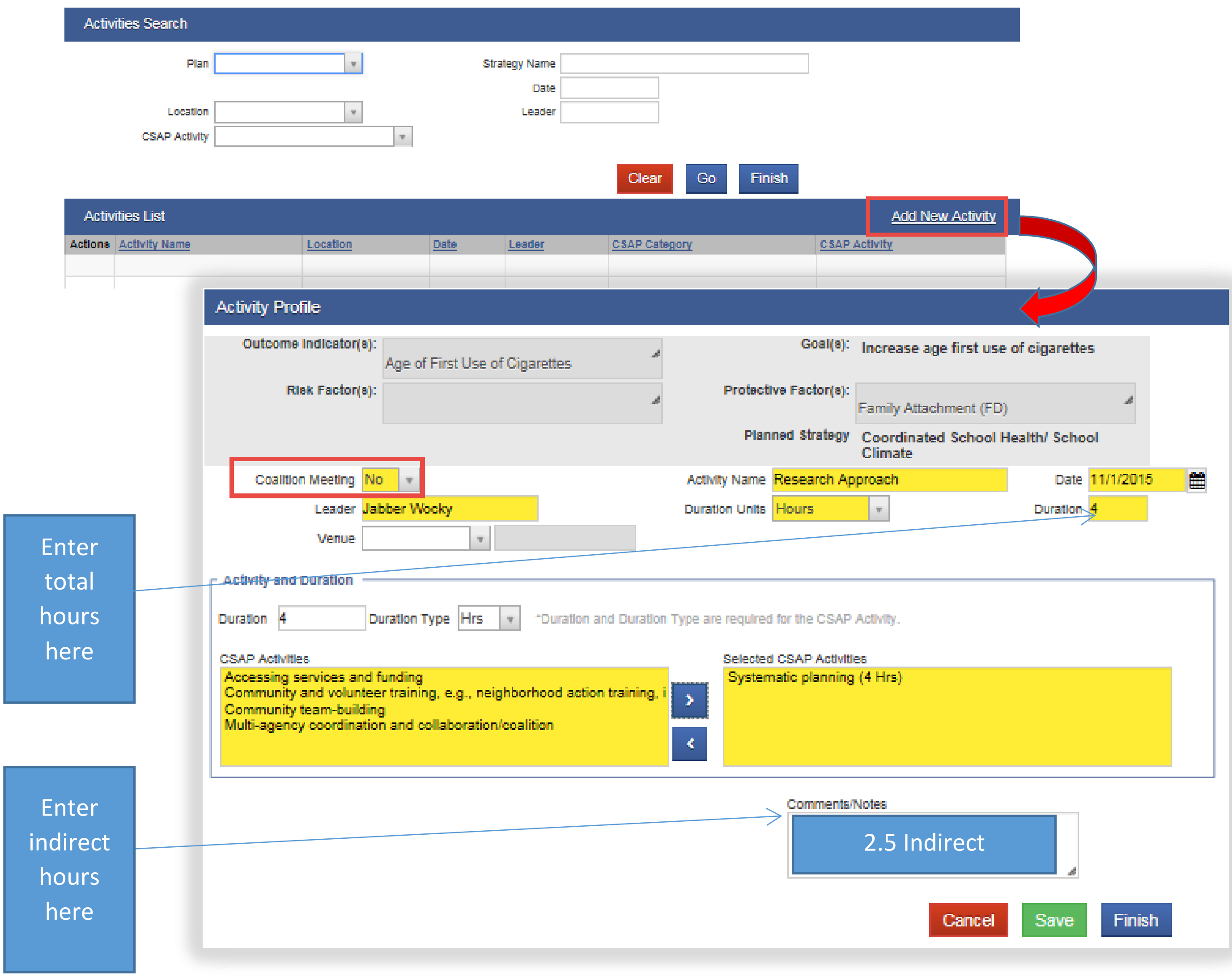
4.4 Recurring Frequency

Recurring strategies are much like one-time strategies, except that they will have certain fields captured on the profile screen, and other fields captured as each varied activity is implemented. It is good to use this frequency type to capture a series of recurring meetings that typically have the same participants (e.g. Coordination meetings, policy meetings, etc.)

1. Enter required fields.
2. When finished, click on the **Save** button.
3. Click on the Activities link in the Administrative Actions to launch the Activities Search and Activities List screen.



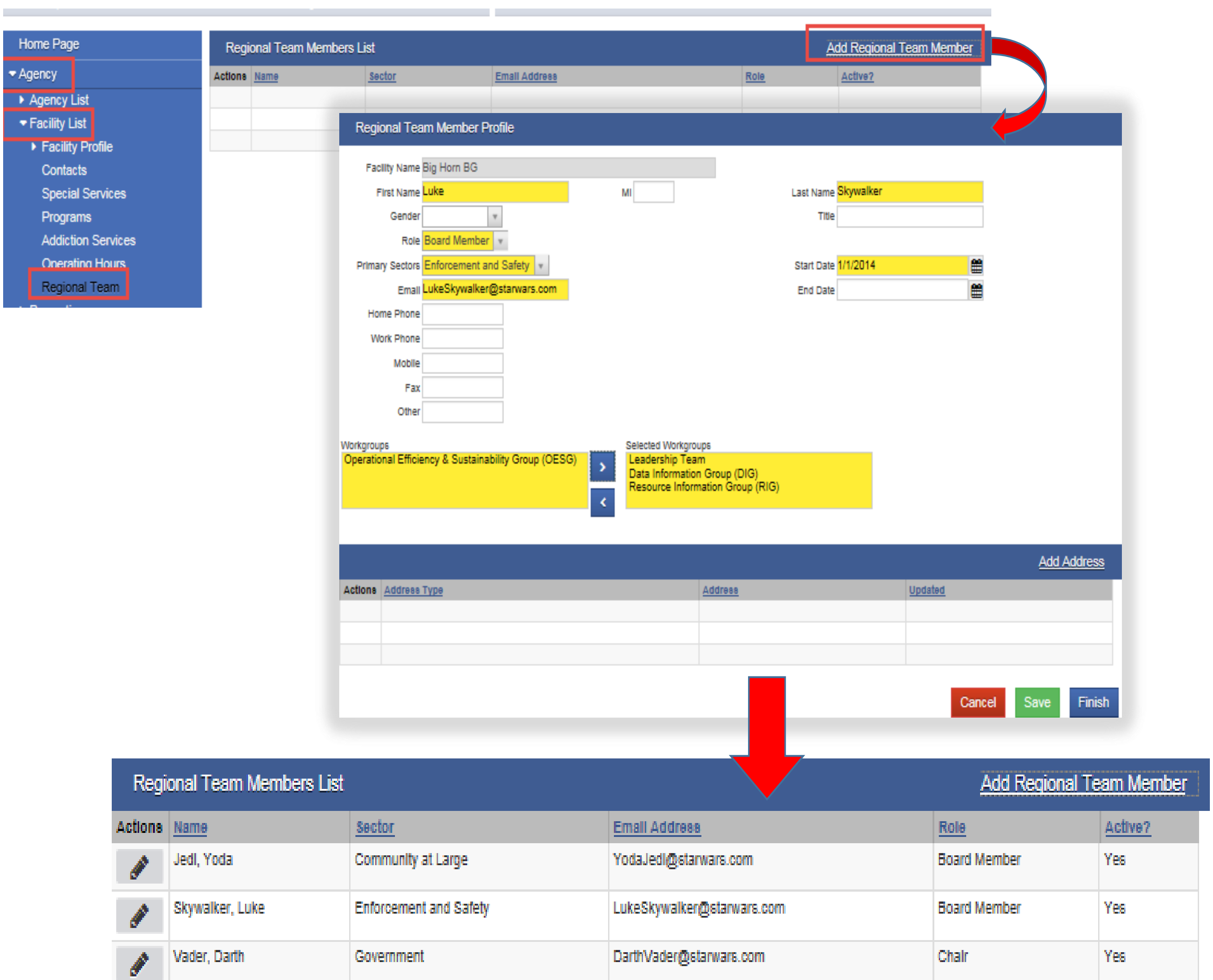
4. May use the Activities Search screen to search for activities to ensure there are no duplicates.
5. From the Activities List screen click on the *Add New Activity* link.
6. This will launch the Activity Profile screen.
7. For non-coalition activities – select 'No' in the **Coalition Meeting** field and complete the required fields.
8. **Selected CSAP Activities** are validated against the **Duration** and **Duration Units** fields.
9. You must include any portion of the duration field that is indirect in the comments section as a number. i.e. "2.5 hours"
    a. This means that if you spent 6 hours on the intervention including prep and the actual intervention combined, but you spent 3 hours preparing, you would put 6 (total hours) in the "duration" box and "3 hours" in the comment box to reflect the indirect time.
10. Click **Save** or **Finish** to save your activity.



Coalition Meeting Pre-requisites

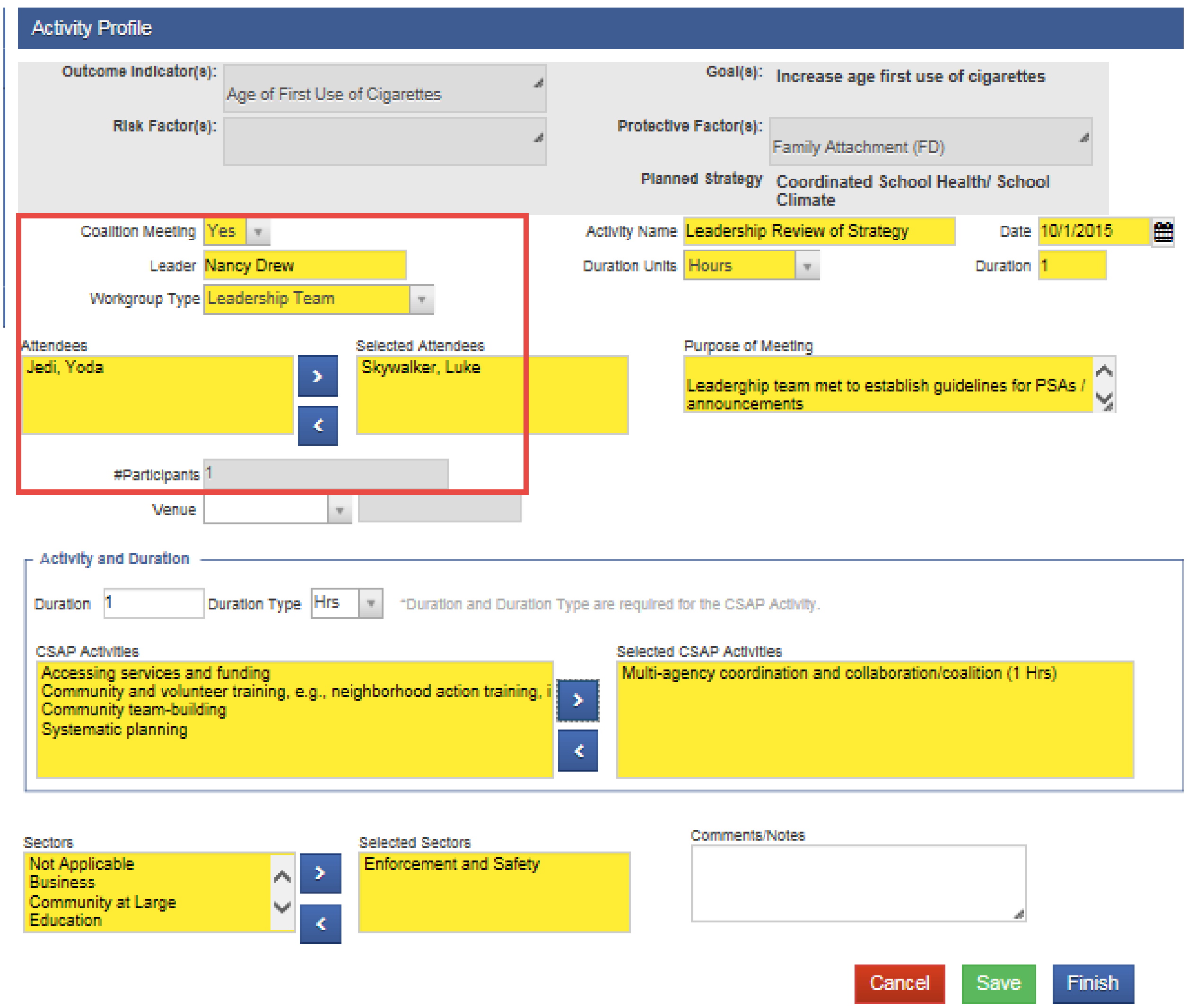
Prior to setting up a coalition activity on a recurring strategy – need to define the Regional Team members that make up that coalition.

1. From the left navigation menu click on Agency > Facility >Regional team
2. You will be presented with the Regional Team Members List. Click on the Add Regional Team Member link.
3. Complete the Regional Team Member Profile required fields
4. Repeat this for all Regional Team Members



Capturing Coalition Meetings on Recurring Implemented Strategy

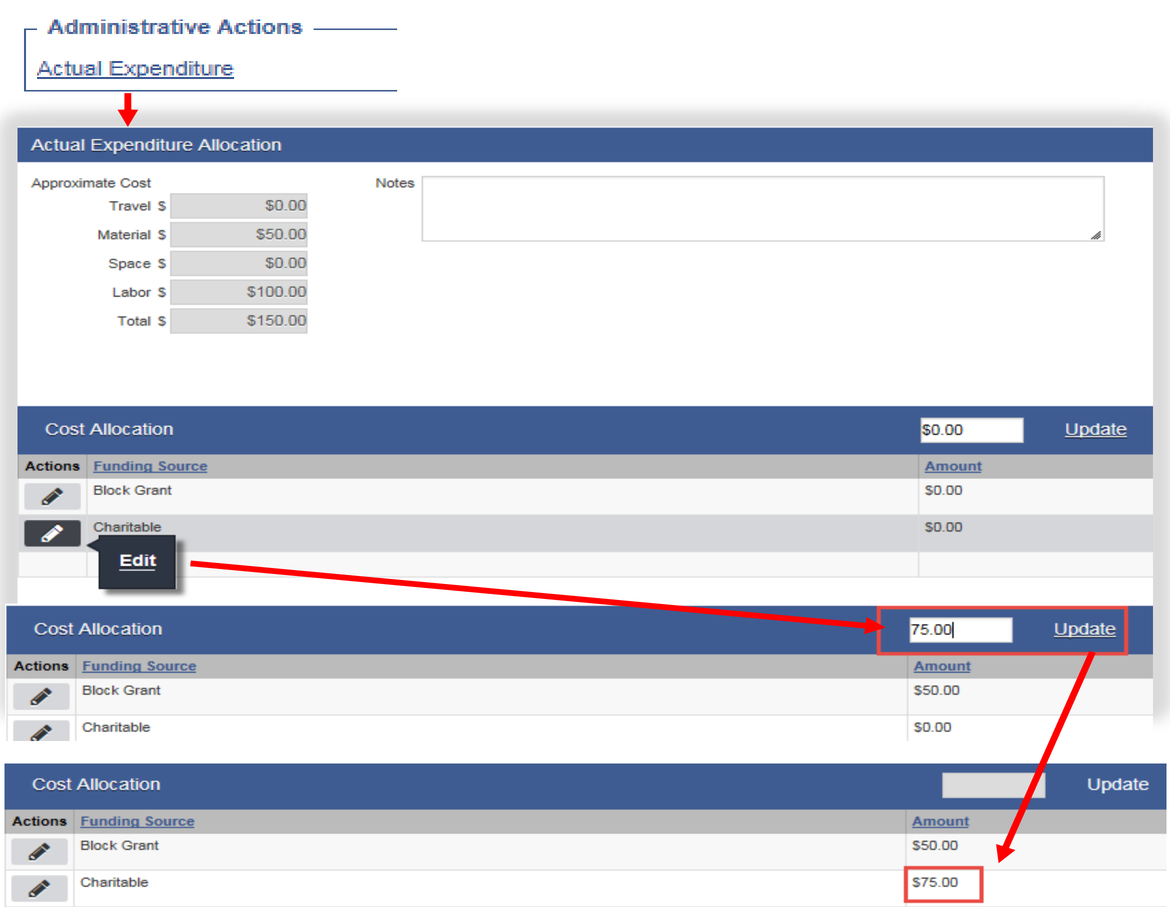
1. Now – when you enter an activity for a recurring activity and select "Yes" on the **Coalition Meeting** field, have several new fields appear.
2. **Workgroup type** provides a dropdown of the values that were defined when the Regional Teams were created.
3. **Attendees** field will be populated from that list of names that were associated with the **Workgroup Type.**
4. The system will calculate the #Participants field when Attendees are selected.



4.6 Actual Expenditures

Actual expenditures need to be created for all implemented strategy frequency types. When you click on the Actual Expenditures Administrative actions link – will see the following.

1. **Approximate Cost** fields are populated from the same fields entered on the Implemented Strategy Profile Screen
2. In the **Cost Allocation** section hover the cursor over the Actions pencil icon and click the Edit action on the **Funding Source** row you want to update.
3. That will cause an amount field to become editable, and the ***Update*** link to appear. Enter the amount for that funding source and click the *Update* link.
4. This causes the **Amount** for that **Funding Source** to be updated with the amount you entered.



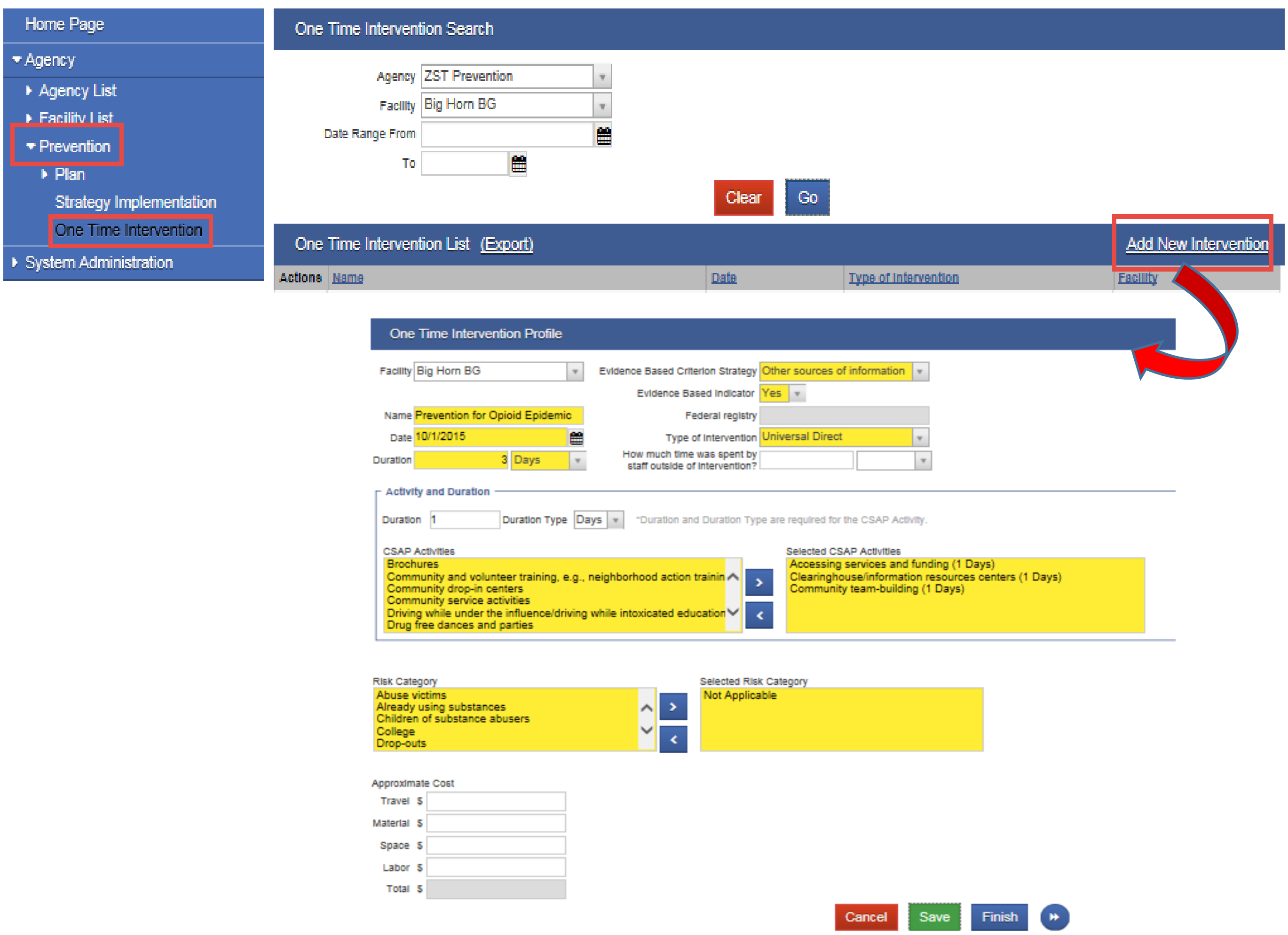
Section 5. One Time Intervention

5.1 Overview

Montana Operational Policy: One time interventions are to be used when changes are needed that fall outside the current approved plan. For example, you have been struggling to get the school on board and you get a call unexpectedly from them requesting you to come and give a presentation to parents about the dangers and data regarding underage drinking. If you do not have anywhere to cover this time in your approved Logic Model, this presentation would be captured as a one time intervention. You must have CDB approval before implementing any one time interventions

5.2 One Time Intervention Process

1. From the left navigation menu – click on Agency > Prevention > Plan > One Time Intervention.
2. This will take you to the One Time Intervention Search and List Screen.
3. Click on the Add New Intervention link to document a one time intervention.
4. Complete the required fields and click on the Save or Finish button to save the record.



Section 6. Technical Assistance \ Support

5.1 Overview

After receiving training, Prevention Providers and Specialists may have questions on WITS, or on State \ BAMS expectations for data entry of their Prevention Plans. This section outlines frequently asked questions and steps that may be followed to address issues.

5.2 Frequently Asked Questions

#	Question\Issue Description	Steps for Resolution
01.	My login or password doesn't work • system is telling me it is invalid • system is telling me I am logged into another IP address • system says I am locked out	**Prevention Specialist:** • Take a screenshot of the WITS screen, including your agency\location information. • Send the screenshot along with the login you were attempting to use to Rona Mcomber RMcOmber@mt.gov (406) 563-7054 **Montana WITS Support Contact** • Will notify you once the problem is resolved.
02.	I've logged into WITS but I don't see the Prevention menu options	**Prevention Specialist:** • Take a screenshot of the WITS screen, including your agency\location information. • Send the screenshot along with description of issue you are having to Rona Mcomber RMcOmber@mt.gov (406) 563-7054 **Montana WITS Support Contact** • Update the Agency type to "Prevention Provider".
03.	Can't update the plan as all the fields are grayed out.	This is occurring because you are attempting to edit a Prevention Plan that is active or has been submitted for approval. If you need to make changes to the plan follow these steps: • From left navigation menu go to Prevention > Plan • You will see Prevention Plan Search and list screen • Click on the Clear button, then the Go button • You will see list of all plans • Select the plan that is in Draft mode to modify • If there is no plan in Draft mode – select the latest version of the plan you want to modify an click on the "Update Current Version" Administrative Action link
04.	I'm trying to enter my plan profile, but it says the Contract field is required – but there are no options to select – I can't save the Plan Profile as it is a required field	**Prevention Specialist:** • Take a screenshot of the WITS screen, including your agency\location information. • Send the screenshot along with description of issue you are having to Rona Mcomber RMcOmber@mt.gov (406) 563-7054 **Montana WITS Support Contact** • In the context of the BAMS agency – establish a contract

		for the agency of the prevention specialist that reported the issue.

#	Question\Issue Description	Steps for Resolution
05.	I don't see the intervention I need to use when creating a planned strategy in WITS	**Prevention Specialist:** • Take a screenshot of the WITS screen, including your agency\location information. • Send the screenshot along with description of issue you are having to Rona Mcomber RMcOmber@mt.gov (406) 563-7054 **Montana WITS Support Contact** Determine if the intervention needs to be added to the Prevention Strategy Type Code Table.
06.	I am trying to enter an actual expenditure on an implemented strategy but no funding sources (e.g. Block Grant, Partnership for Success) appear.	This is occurring because there were no Planned Expenditures set up in your WITS Prevention Plan. You will need to make a draft version of the Prevention Plan you are working with, add the Planned Expenditures on the Planned Strategy and resubmit your plan for approval. Once approved, you will be able to add Actual Expenditures on the Implemented Strategies.
07.	All other questions	**Prevention Specialist:** • Take a screenshot of the WITS screen, including your agency\location information. • Send the screenshot along with description of issue you are having to Rona Mcomber RMcOmber@mt.gov (406) 563-7054 **Montana WITS Support Contact** Triage the issue, if the system is not behaving according to the Montana business requirements, contact WITS support desk for analysis and resolution.